trade and Industry

6 July 1979 Every Friday 50p

Guide to departments

The new structure

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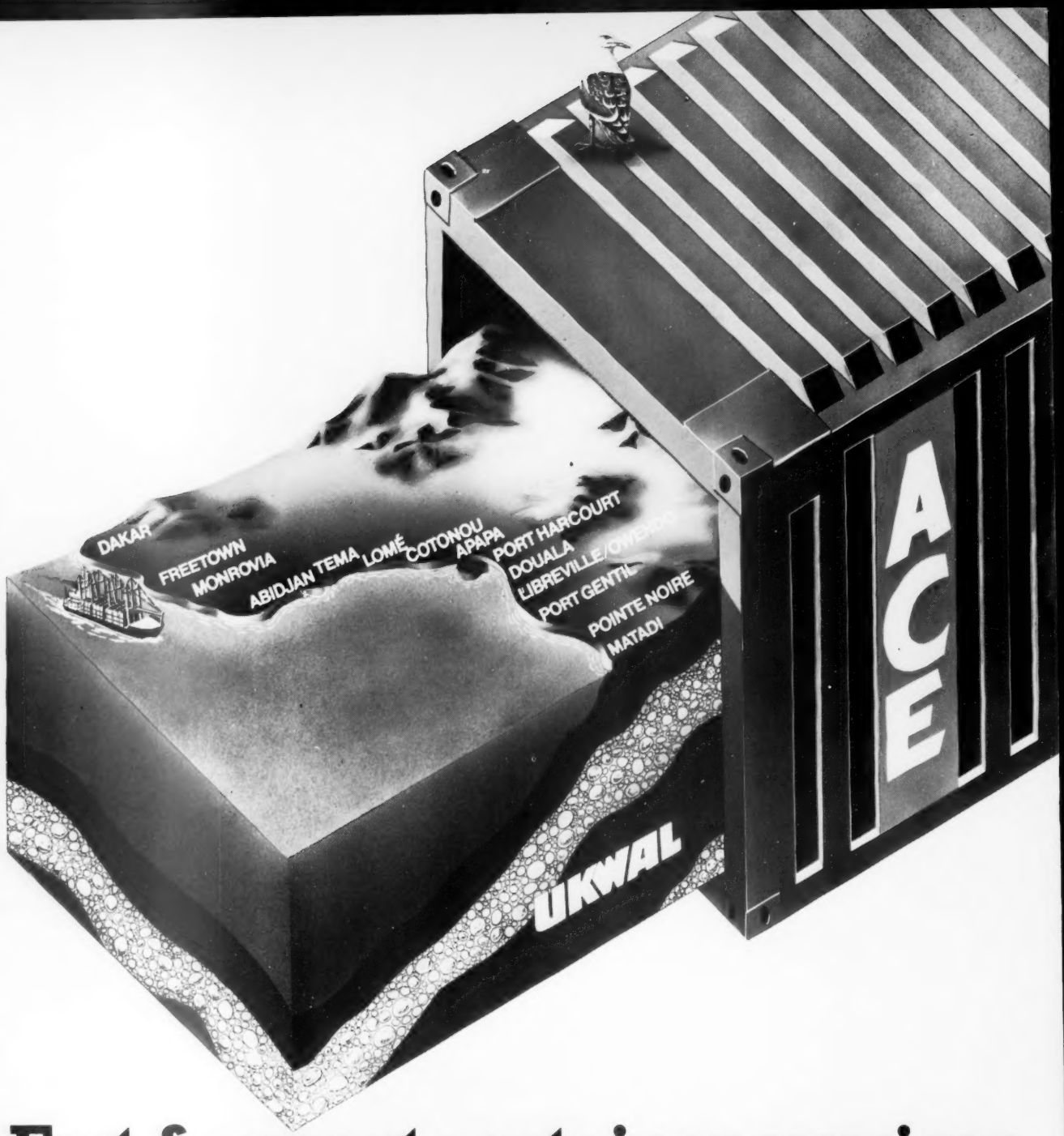

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Trade and Industry

6 July 1979

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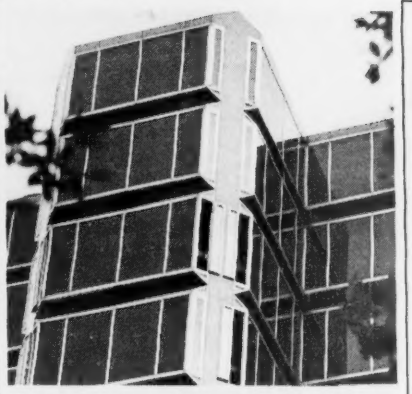

The new structure of the Departments of Industry and Trade, following changes introduced by the incoming government, are set out in our latest Guide (centre pages).

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This week

Sir Keith sets BSC target date for profit 2
Record reserves 2
Tokyo summit concentrates on energy 2
Petrol price increases 'inevitable' 2
Post monopoly in question 3
Companies registrar and post delays 3
Assistance interest rates increased 3
Campaign seeks jobs for disabled 3
Angolans come to talk trade 3
Nott visits Royal Show exporters 3
Colombian president discusses trade 3
Economic indicators 4

Home news

Butler tours shipyards 6
Shell/Esso orders multi-function vessel 6
Drive to modernise city's old industrial areas 6
Adult employment subsidy experiment ends 6
Director fined over grant application 6
Aviation security levy for next year 7
Merger proposals cleared 7
Sir Keith Joseph visits north-east 7
Green light for second Heysham nuclear station 7
Instant coffee goes metric 7
How cuts will affect departments 7
WDA and Morris Vulcan form Tri-ang company 8
Skills training crucial: MSC chairman 8
Changes in VAT and the Consumer Credit Act 8
Regulations changed for poultry meat 8
Small firms clinic in High Wycombe 8
City Link signs with 'Red Star' 8
Government sales 8

New publications 11

Technology news

Gamma seeks to reduce software cost 12
Gaseous filtration on test at Didsbury laboratory 12
NRDC marks up 30 years of innovation 12
Canada buys British fluidised-bed technology 12
Oil and computers mixed by BNOC 13
OU and Insac to develop electronic teaching systems 13
Molten metal explosions can kill 13

New products 14

Parliament 16

European community news

Britain receives more EIB funds 18
EIB loan for Yorkshire pump factory 18
Conference on food and drink directive 18
Single market for services should be a priority 18
EEC consumer protection programme 18
Lomé convention renegotiated 18
Government firm on fisheries conservation 19
EEC protection of water 19
Atmosphere pollution draft directive 19
Tariff suspensions on fish imports 19
EEC indicative ceilings for imports from Efta 19
New legislation 19
EEC company law harmonisation programme: checklist 20

Overseas trade news

Major opportunities for European construction industry 21
Get the export message down the line – Parkinson 21
Licensing exports of non-alloy ferrous scrap to outside EEC 21
'Hints to exporters' booklets issued 22
Visit by commercial officer from Australia 22
Double taxation—UK/USSR talks: agreement with Sri Lanka: relief booklet revised 23
London chamber plans ME events 23
Manchester chamber considers India tour 23
Dundee mission to Singapore and Malaysia 23
Yorkshire mission to visit Asia 25
ECGD statutory returns 25
Notice to importers
1745: revised 1979 arrangements for imports from Czechoslovakia, GDR and Romania 25
Market report: Algeria 26

Exhibitions

Adventurous British in Toronto 28
Portugal's president visits UK joint venture 28
First joint venture at Paritex wins orders 28

Country data

Australia 29, Denmark 30, Faroe Islands 30; France 30; Indonesia 30; Iran 30; Italy 30; Mexico 30; Paraguay 30; Sierra Leone 30; South Africa 30; Syria 31; United States 31; Yugoslavia 31

Export services 31

Statistics

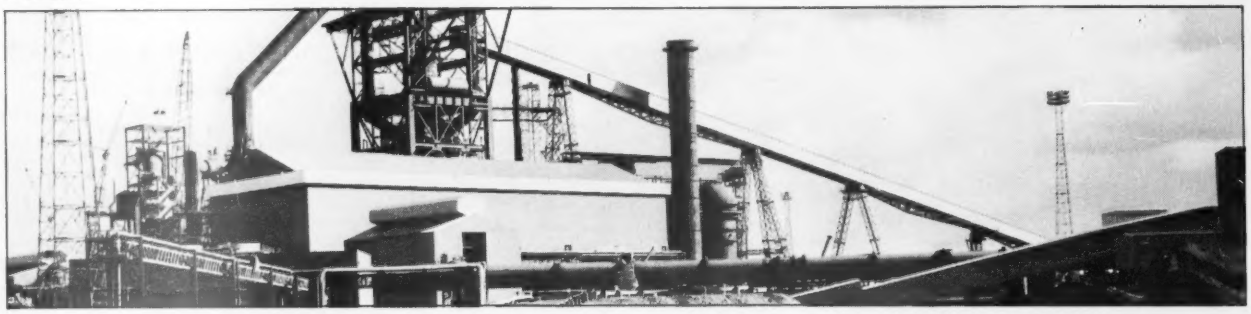
The economy: selected indicators 32
Economic indicators of the industrial countries 33
Retail sales: May 36
Hire purchase and other credit business: May 37
Machine tool sales and orders: March 38
Cost indices for the aerospace and radio, radar and electronic capital goods industries 39
Capital expenditure of the manufacturing, distributive and service industries: first quarter revised estimates 40
Unemployment and vacancies: June 42
Manufacturers' and distributors' stocks: first quarter revised estimates 43
UK imports invoiced in foreign currencies 45
Nationality of vessels in UK seaborne trade: 1978 46
Textiles and clothing: first quarter 49
Made-up clothing orders and deliveries: March 51
Patents recorded 'licences of right' 51
Films and tv material: overseas transactions in 1978 52
British Film Fund Agency returns 53
Cinema admissions and takings in March 53
Registrations of British, community and foreign films 54
Business Monitors 54
Index to statistics 54

Readers' reply service 55

Guide to departments centre pages

Trade and Industry this week

HOME



Sir Keith sets BSC target date for profit

Industry secretary Sir Keith Joseph has set the British Steel Corporation a financial target of operating at a profit in 1980–81.

'The government does not intend to finance operating losses,' Sir Keith said in a written answer in parliament on Tuesday. He had set the corporation the target of operating at a profit in the 1980–81 financial year after providing for depreciation and interest.

'To reinforce this target,' Sir Keith added, 'the cash limit for 1980–81 will be set at a level intended, with internally generated funds, to cover fixed investment and other essential capital requirements.'

British Steel Corporation reported on Tuesday that it lost £309.4 million after all charges and credits in the year ended 31 March, compared with its £443 million loss the year before. The trading loss (after depreciation and before interest) was reduced from £275 million to £130 million which represents a substantial improvement, says the corporation's annual report and accounts.

UK steel demand was lower than the previous year, and lower than any year since 1962-63; so although BSC maintained market share in the year its sales were the lowest since the corporation was formed.

Sir Charles Villiers, BSC chairman, said: 'The current year is very difficult. The present and prospective rate of inflation is swelling our costs in all directions. The market for steel is nearly flat in this country and little better in Europe as a whole. Prices in Europe are very weak due to overcapacity and over production and in the UK. We have announced moderate increases from 1 July, which we shall do our best to maintain.'

He expected that in the first half of this year the corporation's loss would be within £150 million, but this figure was before making allowance for contingencies and without taking any account of exchange gains or losses on foreign currency. The target of breaking even by March 1980 remained, although the economic indicators had become more unfavourable since it was set.

Reserves record

UK official reserves rose by $538 million in June. At the end of June the reserves stood at a record level of $22,070 million.

Tokyo summit concentrates on energy

Determination at last week's Tokyo economic summit not to print money to compensate for higher oil prices was unanimous, Prime Minister Margaret Thatcher told the commons on Tuesday.

Reporting to the house on return from the summit which she said had reacted 'realistically' to the Opec oil price rise announcement, Mrs Thatcher stressed that the heads of government were united in their belief that if they were resolute in restraining demand for oil in the short term, they had all the skills and incentives to enable them to reduce dependence on uncertain sources of supply in the longer term.

This was rightly a summit which concentrated mainly on energy, she said. She believed that the fact that heads of government could take these decisions together would contribute significantly to achievement of their objectives.

The importance of developing to the full existing and new sources of energy as alternatives to oil was stressed, she said, particularly the need to expand, with safety, nuclear power generating capacity. 'Without this, the prospect for growth and employment would be bleak.'

Mrs Thatcher said the summit welcomed and took full account of the decisions reached by the European council in Strasbourg the previous week and agreed action designed to align the decisions taken there with corresponding decisions taken at Tokyo by the United States, Japan and Canada.

The UK, France, Germany and Italy, she said, agreed to recommend to their community partners that each member country's contribution to the community objective of maintaining oil imports between 1980 and 1985 at an annual level not higher than last year should be specified. The United States took as a goal its import level for 1977, and Japan and Canada took goals relating to their particular supply position. There was also general agreement that domestic oil prices should be at world market levels, she pointed out, and on a number of measures to ensure a better flow of information about operations in the oil markets.

The summit made it clear that the industrialised countries were ready to co-operate with oil producers in defining supply and demand prospects in the world oil market, she explained. 'I believe that such discussions could make a valuable contribution to the future stability of the oil market.'

The summit had also provided the opportunity for bilateral discussions with President Carter, the new Canadian Prime Minister, with other European leaders. On the way to Tokyo, Mrs Thatcher met the Soviet Prime Minister Mr Kosygin and on the return journey, she had talks with the Australian Prime Minister, Mr Fraser, and with Sheikh Khalifa, Prime Minister of Bahrain.

More petrol price increases 'inevitable'

Further increases in the price of petroleum products must inevitably follow from the decision of the Opec producers last week to increase crude oil prices.

Energy Secretary David Howell told the House of Commons on Monday that one major company operating in the UK market had increased its product prices, partly in response to the upward movement of crude oil prices over the preceding weeks and partly in response to the latest Opec decision. He regretted the increases that were, and are, bound to come, but the UK consumer could not be shielded from the effects of the increases without endangering supply.

As for distribution, he said, action taken by the government should contribute to improved supply in the third quarter of the year, though he knew that particular difficulties remained

in some areas especially, though not exclusively, for farmers and rural communities.

He pointed out that the UK Petroleum Industry Association had undertaken to handle the requirements of customers with problems in times of crisis as flexibly and swiftly as supply constraints allowed, particularly where the harvest and the weather imposed sharp seasonal increases in agricultural fuel needs.

Post monopoly in question

It would be necessary to review the Post Office's monopoly for the carriage of letters if co-operation to improve services is not manifest, industry secretary Sir Keith Joseph told parliament on Monday. He is to ask for reports on possible modifications, their practicability and their implications, to reach him before the end of the year.

He explained that in the middle of last week the Post Office had a backlog of one and a third days mail – some 40 million letters. This was the cumulative effect of industrial action in the Post Office and on the railways, bad weather earlier in the year, staff shortages and letter bombs in Birmingham. The worst effects had been in the London area.

Sir Keith welcomed the extensive efforts over last weekend to reduce this backlog. But while improvements were made some problems remained, particularly in parts of London and the south east. Continued efforts would be necessary.

Although he recognised that special circumstances, some of them beyond the Post Office's immediate control, had played a considerable part in last week's difficulties these problems had only confirmed that much needed to be done to improve the efficiency and productivity of the postal service. He had made this clear to the chairman of the Post Office. He was particularly disappointed that an offer by the Post Office of better pay for reduced costs, higher productivity and better services had been refused by the workforce.

Companies registrar and post delays

In spite of delays in postal services the Registrar of Companies does not have powers under the Companies Acts to exercise discretion over the timing of submissions on mortgages or charges.

The Companies Act 1948 requires prescribed particulars together with the instrument of such a charge to be delivered within 21 days after the date of its creation, said the registrar in a statement issued on Wednesday.

The registrar said he would accept delivery by hand either at his office in Cardiff or at the search room in City Road, London. Failure to comply with the requirements of the act would mean he would have no option but to reject registration and the company would then need to apply to court for permission to extend the period.

Liquidators were similarly reminded of this obligation to lodge accounts and other documents within specified time limits. Again, delivery by hand would be accepted in London or Cardiff in accordance with normal practice.

Assistance interest rates increased

Maximum rate of interest relief grant and interest rates for loans under section 7 of the Industry Act 1972 are increased with effect from last Monday, 2 July.

The rate of interest relief grant available in those cases where it would be appropriate to allow the equivalent of an interest free period on a Department of Industry loan, but where firms obtain their finance from other sources, is being increased from 12 per cent to 13½ per cent for each interest free year.

The 'concessionary' rate of interest on loans for employment creating projects (category A) is increased from 9 per cent to 10½ per cent. The 'broadly commercial' rate of interest on loans for modernisation projects not providing additional employment (category B) is increased from 12 per cent to 13½ per cent.

Campaign seeks jobs for disabled

Jobs for Britain's 130 000 disabled people are to be promoted in a Manpower Services Commission 'Fit for work' campaign directed especially at employers in industry and commerce. Up to 100 awards will be made each year to firms demonstrating exemplary policies and practices in the employment of disabled people.

Announcing the campaign in parliament on Wednesday, Parliamentary Under-Secretary of State for Employment James Lester said its aim was to promote a wider understanding of the employment needs of disabled workers and of their abilities, and to create more and better job opportunities for them.

Employment secretary James Prior will open the campaign at Marylebone Station, London, on 17 September as a British Rail exhibition train starts on a nationwide tour.

The campaign is backed by the government, the Confederation of British Industry, Trades Union Congress and the National Advisory Council on the Employment of Disabled People.

OVERSEAS

Angolans come to talk trade

Trade minister Cecil Parkinson met a senior delegation from Angola headed by Dr Jose de Carvalho, governor of the national bank, on Wednesday.

This was the first delegation to visit the UK since Angola's independence. Trade prospects for UK companies lay particularly in the agriculture, food processing and transport sectors, Dr Carvalho said.

Mr Parkinson was 'very encouraged' at the level of trade between the two countries in 1978 which amounted to £65 million. He expressed the hope that there would be further expansion.

Nott at Royal Show

British agricultural exporters at the Royal Show, Stoneleigh, were visited by trade secretary John Nott on Tuesday. He discussed with them the prospects for increasing their exports.

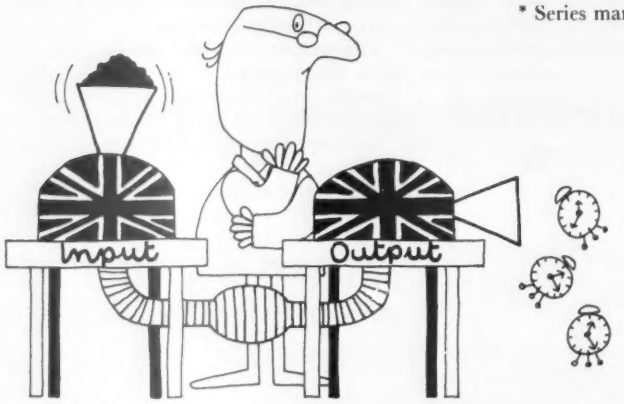
Representing almost 6 per cent of Britain's visible exports, the value of exports of agricultural machinery and products in each of the past two years has reached £2,000 million.

Colombian president discusses trade

President Turbay of Colombia met industry secretary John Nott (right) on Monday during his official visit to the UK. Mr Nott led a delegation of businessmen in discussing with the president and some of his ministers ways of increasing trade and furthering British investment in Colombia's development plans. Colombia was the UK's fifth largest export market in Latin America in 1978, with exports value at £50.8 million. Major purchases by Colombia were in specialised machinery, power equipment, chemicals and beverages.

Economic indicators at a glance

* Series marked with an asterisk are not seasonally adjusted.



Output

Gross domestic product. The output measure of gdp fell by 1 per cent between fourth quarter 1978 and first quarter 1979, largely as a result of bad weather and industrial disputes, especially in the road haulage industry. Manufacturing output fell by 1 per cent and the output of the construction industry, particularly dislocated by the severe weather, dropped 10 per cent. These falls were partially offset by a rise in the output of both the gas, electricity and water industries and the mining and quarrying industries, the latter incorporating the steady growth in North Sea oil production. In the service industries, also affected by the bad weather and industrial disputes, the fall in output of the transport industries was 6 per cent.

Index of industrial production. Provisional estimates for the first four months of 1979 suggest that, in total, the underlying level of industrial output is much the same as it was in summer 1978, a small reduction in manufacturing industries' output being broadly offset by an increase in the output of the energy sector. The provisional estimate for April is 115.0.

Farm machinery worth £8m for Japan

This Massey-Ferguson 70 rotary mower is among a new generation of agricultural products that Britain is supplying to Japan as the result of an £8 million order. The Japanese order, which also covers tractors, combine harvesters and manure spreaders, follows a similar success in Sri Lanka where orders valued at £5 million have been obtained for British-made farm tractors.

Consumers' expenditure

Consumers' expenditure in the first quarter 1979 is estimated to have risen by about 1 per cent despite a 1½ per cent fall in retail sales. The rise was mainly due to a substantial increase in expenditure on fuel and light and an increase in expenditure on motor vehicles both of which are not covered by the retail sales index. In the latest two quarters, expenditure rose by 1½ per cent though it was 5 per cent higher than a year earlier.

Retail sales. Revised figures for the volume of retail sales in May show that trade in non-food shops in May fell from the high level in April when their sales appeared to be making good for trade lost in the first quarter. However, sales in May of both food and non-food shops were significantly higher than the level in the fourth quarter of 1978. In the first five months of 1979 the average level of sales was little changed compared with fourth quarter 1978. There was an increase of 2 per cent in sales by durable goods shops and 1 per cent in food shops but there were falls of 1 per cent in clothing and footwear and other non-food shops.

Prices and costs

Wholesale price index* (provisional) for materials and fuel purchased by manufacturing industry rose by 1½ per cent in May. The most significant contribution was made by higher prices for crude oil, partly the result of a slight depreciation in sterling's value against the dollar. In the latest three months the index increased by 4¾ per cent and was 9 per cent higher than a year earlier. The index for materials, excluding crude oil, purchased by the non-food, drink and tobacco manufacturing industries, rose by 5.7 per cent in the three months to May. The index for wholesale output prices rose by 1¼ per cent in May. In the latest three months the index increased by 3¼ per cent and was 9½ per cent higher than the year earlier.

Retail prices index* rose by ¾ per cent in May after the sharp rise of 1¾ per cent in the previous month associated with seasonal increases in rates and rents. Much of the increase in May was due to rises in non-seasonal food prices and motoring costs. The year-on-year increase continued to rise and was 10.3 per cent in May. The budget changes in indirect taxes will effect the index for July and are expected to add directly about 3¾ per cent to the index by the autumn.

Terms of trade* During the three months ended May export prices rose faster than those of imports and the terms of trade index rose by 3 per cent on a year earlier.

UK competitiveness, measured by normalised unit labour costs, worsened again in 1978 Q4 as sterling continued to rise.

Investment

Manufacturing industry's volume of fixed investment (revised figures) fell by less than 1 per cent in the six months ending 31 March but was 4½ per cent higher than a year earlier. However, excluding the iron and steel industry investment increased by 1 per cent in the latest two quarters and was 9½ per cent higher than a year earlier.

Distributive and service industries' volume of fixed investment (excluding shipping) rose by about 2½ per cent in 1979 Q1.

The DoI investment intentions survey carried out in April/May confirms the results of the previous surveys which indicated a further increase in 1979 in the volume of investment by both manufacturing industry and the distributive and service industries (excluding shipping). It also supports the previous expectation that the upward trend in investment will continue in 1980 for the distributive and service industries but probably not for manufacturing. The volume of investment by manufacturing, which rose by 7 per cent in 1977 and 8 per cent in 1978, is expected to increase by 2 to 5 per cent in 1979 (against 4 to 8 per cent

expected by the December survey), with possibly a slight fall in 1980. Investment by the distributive and service industries (excluding shipping) is expected to rise in 1979 for the fourth consecutive year. The latest information indicates that the outcome is likely to be in the range 5 to 7 per cent, with a further increase of similar magnitude in 1980.

Incomes

Real personal disposable income (RPDI) rose by 1¼ per cent in 1978 Q4 giving a large increase of 6½ per cent in 1978 as a whole. The rise in 1978 followed falls in the previous three years. (Figures for 1979 Q1 due to be published today 6 July).

Average gross earnings* (new series) rose by about ½ per cent in April. The year-on-year increase fell from 14.6 per cent to 13.5 per cent mainly because the April 1978 figure was boosted due to backdated pay settlements. By April about half of those workers likely to settle in major agreements had settled and received increases, about the same proportion as a year earlier. Average earnings have increased by 8 per cent in the current pay round compared with 8¾ per cent at the corresponding time last year, still suggesting that the outcome of the present pay round will be much the same as last year's.

Labour

Unemployment (UK excluding school leavers) fell by 26 800 during June to 1 279 600 (5.3 per cent of all employees). This was the lowest figure since June 1976. Unemployment in June was down in all the English regions and in Scotland, Wales, and Northern Ireland. With the fall of 40 000 since the beginning of this year and the steady decline throughout 1978 the level of unemployment is now 145 000 lower than the peak at the end of 1977.

Unfilled vacancies (mainly for adults) notified to employment offices in June numbered 262 400 – an increase of 5100 since May.

Companies

Gross trading profits of industrial and commercial companies net of stock appreciation fell by ½ per cent in the latest two quarters, reflecting the lower level of activity in the first quarter 1979, and were 3 per cent higher than a year earlier. Revised figures due to be published today 6 July.

Liquidity of the (large) industrial and commercial companies replying to the DoI's company liquidity survey fell appreciably in the first quarter 1979, bringing their net current assets and liquidity ratio to the lowest levels since mid-1977. Liquidity has now fallen for three consecutive quarters, after rising strongly from the third quarter 1977 to the second quarter 1978.

Net borrowing requirement of industrial and commercial companies' was much the same in 1978 as in 1977.

Balance of payments

Current account of the balance of payments in the five months to May was in deficit by £1,079 million. The latest figures have been distorted by the effects of the road haulage dispute and the delays in the flow of information to customs and excise, and are not thought to be a good guide to the underlying trend. There was a deficit of £1,693 million on visible trade in the first five months of 1979 (£339 million a month) compared with a deficit of £406 million (£68 million per month) in the second half of 1978. The projected surplus on invisibles in the first five months of £614 million contains a lower figure for April and May reflecting higher net contributions to the EEC in the second quarter. The current account was thus in deficit by £1,079 million in the first five months of 1979 (£216 million per month) compared with a surplus of £604 million (£101 million per month) in the second half of last year.

UK official reserves* (revalued in March at market related rates) rose by $538 million in June to a record level of $22,070 million.

Volume of trade. After making rough allowance for the distortions in the trade figures, the volume of exports is thought to have fallen a little so far this year. One major reason for this fall is the lower level of deliveries to Iran and Nigeria (a decline of £100 million a month in value terms). On the other hand, the volume of imports has increased in the same period with large rises in imports of road vehicles and chemicals, possibly for stockbuilding.

DoT's survey of short-term export prospects, based on replies received from 57 large exporting companies, suggests that the total volume of UK visible exports will rise by about 2 per cent in 1979, a slower growth rate than the 3½ per cent in 1978. A fall in volume of 2 to 3 per cent is expected in the first half 1979, due to the lower shipments to Iran and Nigeria, followed by a rise of 5 to 6 per cent in the second half 1979. Respondents expect the year-on-year rise in export prices to be 13 per cent in the rest of 1979 compared with 9½ per cent in the first quarter and around 4 per cent in 1978.

Exchange rates

The bank note rates of exchange in London on 29 June are given below. Supplied by Thomas Cook Bankers Ltd, the rates are intended as a guide only and are subject to fluctuation. OECD countries are shown in bold.

		You buy at	You sell at
Afghanistan	Afghani	125	145
Andorra	(See France/ Spain)	—	—
Antigua	E. Caribbean dollar	5.42	5.62
Argentina	Peso	2 550	2 850
Australia	**Dollar**	**1.9225**	**1.9825**
Austria	**Schilling**	**29.00**	**31.00**
Bahamas	Dollar	2.10	2.25
Bahrain	Dinar	0.83	0.8650
Barbados	Dollar	3.96	4.29
Belgium	**Franc**	**66.50**	**70.00**
Belize	Dollar	4.20	4.77
Benin	CFA	462	482
Bermuda	Dollar	2.05	2.19
Bolivia	Peso	43	53
Botswana	Pula	1.95	2.25
Brazil	Cruzeiro	65	81
Brunei	Dollar	4.66	4.86
Cameroon	CFA	462	482
Canada	**Dollar**	**2.50**	**2.57**
Chile	Peso	75	90
China	Ranimbi Yuan	Refer	Refer
Colombia	Peso	83	99
Costa Rica	Colon	18.50	20.50
Cyprus	Pound	0.72	0.76
Denmark	**Krone**	**11.37**	**11.87**
Dominica	E. Caribbean dollar	5.42	5.62
Ecuador	Sucre	56	66
Egypt	Pound	1.56	1.70
Eire	**Pound**	**1.03**	**1.07**
Fiji	Dollar	1.8050	1.8850
Finland	**Markka**	**8.35**	**8.70**
France	**Franc**	**9.10**	**9.50**
Germany, FR of	**Deutschmark**	**3.95**	**4.17**
Gibraltar	Pound	1.00	1.05
Greece	**Drachma**	**76.25**	**81.25**
Grenada	E. Caribbean dollar	5.42	5.62
Guyana	Dollar	9.25	Refer
Hong Kong	Dollar	10.85	11.28
Iceland	**Krona**	**807**	**837**
Indonesia	Rupiah	1 200	1 600
Iran	Rial	215	Refer
Iraq	Dinar	0.77	0.82
Israel	Pound	48	53
Italy (20 000 and smaller)	**Lira**	**1 760**	**1 845**
Japan	**Yen**	**470**	**495**
Jordan	Dinar	0.65	0.69
Korea	Won	1 200	1 600
Kuwait	Dinar	0.595	0.625
Lebanon	Livre	7.05	7.55
Liberia (see USA)		—	—
Libya	Dinar	0.90	1.15
Luxembourg (see Belgium)	**Franc**	—	—
Madeira (see Portugal)	Escudo	—	—
Malaysia	Dollar	4.64	4.86
Malta	Pound	0.745	0.775
Mauritius	Rupee	11.88	13.75
Mexico	Peso	46	56
Monaco (see France)	Franc	—	—
Netherlands	**Guilder**	**4.34**	**4.57**
New Zealand	**Dollar**	**2.10**	**2.19**
Nigeria	Naira	2.35	Refer
Norway	**Krone**	**10.93**	**11.38**
Oman	Rial	0.7475	0.7925
Pakistan	Rupee	Refer	Refer
Peru	Sol.	460	590
Philippines	Piso	15.50	18.50
Portugal	**Escudo**	**101.50**	**106.50**
Qatar	Rial	8.17	8.52
Saudi Arabia	Rial	7.35	7.71
Seychelles	Rupee	12.87	13.35
Sierra Leone	Leone	2.25	2.50
Singapore	Dollar	4.60	4.84
South Africa	Rand	2.20	2.40
Spain	**Peseta**	**140.00**	**147.00**
Sweden	**Krona**	**9.15**	**9.55**
Switzerland	**Franc**	**3.56**	**3.78**
Syria	Pound	9.20	9.70
Taiwan	Dollar	85	105
Thailand	Baht	41	47
Trinidad and Tobago	Dollar	5.30	6.40
Turkey	**Lira**	**90.00**	**94.00**
Uganda	Shilling	Refer	Refer
United Arab Emirates	Dirham	8.32	8.67
USA	**Dollar**	**2.1550**	**2.2150**
Venezuela	Bolivar	8.80	10.30
Yemen Arab Republic	Rial	12.50	15.50
Yugoslavia	Dinar	40.00	42.00
Zambia	Kwacha	Refer	Refer

Where more than one rate applies to a currency, the rate given is that for small denomination notes.

Exchange rate

Effective sterling exchange* rate index rose during the week to 69.4 – the highest level for three years – by the close on Thursday 28 June (December 1971 = 100).

Finance

Public sector borrowing requirement (PSBR) fell to £2.6 billion in the fourth quarter of the financial year 1978-79. The PSBR for the full financial year amounted to £9.2 billion.

Domestic credit expansion was quite large again in May at £0.9 billion. The central government borrowing requirement was lower than in April, but sales of government debt were also lower and a sizeable amount of certificates of tax deposit was redeemed. Bank lending to the private sector continued at a high level.

Sterling M3 rose by £0.6 billion (1½ per cent), rather less than DCE, implying some external outflow from the private sector. In the seven months since mid-October it has risen by about 7½ per cent, 13 per cent at an annual rate. The new guidelines for £M3 from mid-June 1979 to mid-April 1980 are 7 to 11 per cent at an annual rate.

Bank of England minimum lending rate (MLR) – 14 per cent, effective from 13 June.

More information

For a backrun of figures for some of these indicators see 'The economy: selected indicators', page 32. Inquiries on any of these indicators should be addressed to Economics and Statistics Division 4B, Departments of Industry and Trade, Room 173, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3453.

Home news

Butler on fact-finding tour of shipyards

Industry minister Adam Butler made a three-day fact-finding visit to Merseyside and the north-east last week as a prelude to government decisions on the future of the shipbuilding industry. It followed a visit to Birkenhead yards by Secretary of State Sir Keith Joseph.

He stressed the importance of hearing the views of local management and unions to add to those of top British Shpbuilders management and of trade union leaders before decisions are made.

Mr Butler, who has special responsibility in the department for shipbuilding, said that he wanted to see a thriving merchant shipbuilding industry. 'I understand the view of those who feel that Britain without such a capacity is unthinkable. However, we have to face facts. There is worldwide over-capacity, the recession continues, and generally our yards can't win orders without heavy subsidies.'

He said that he believed that the gravity of the situation was now recognised and that the inevitability of further contraction was generally accepted. In this sort of situation the government had to see what it could do to help.

Emphasising his role as a custodian of the taxpayers' money, Mr Butler continued: 'In considering the further expenditure of public funds on shipbuilding, I have to be sure that the money spent is really justified and cost-effective. I also have to be sure that within a very few years the industry will be efficient and able to compete without subsidy in a world market which is going to remain intensely competitive for some time. This will demand a massive effort from all those who work in the industry.'

Pointing out that money given to the shipbuilding industry had to come from other taxpayers' pockets, or from profitable industries, Mr Butler declared: 'Every £1 taken from those industries affects job prospects in them.'

Meanwhile, as a matter of priority, the government was to bring the intervention fund back into operation and was also continuing the special redundancy payments scheme.

Shell/Esso orders multi-function service vessel

The Shell/Esso decision to award the contract for the construction of a multi-function service vessel to a Finnish shipyard was announced in the House of Commons on 19 June by Hamish Gray, Minister of State for Energy.

The government recognised that the order would have brought valuable work to UK yards but considered that the degree of subsidy required could not be justified. The vessel would however be built to an advanced design by Seaforth Maritime, a wholly British-owned offshore engineering and service company based in Aberdeen which had also secured a five-year £100 million operating contract for the vessel. There were also good prospects that orders worth about £16 million for installed equipment would be placed in the UK.

Drive to modernise city's industrial areas

A major new incentive is to be launched by Nottingham City Council to re-vitalise parts of the older industrial sectors of the city to help create more employment opportunities. It follows approval by the Department of the Environment to the designation of the Lace Market and Gamble Street as improvement areas.

Main aims of the council are to restore confidence, promote new investment, make a significant improvement in the physical appearance of the areas and safeguard employment and increase job opportunities.

Finance will be directed towards firms undertaking environmental improvements benefiting the area as a whole, and improvement and adaptation of their premises to achieve increased efficiency; towards modernisation and re-use of vacant buildings and floorspace; and re-development of vacant land. The council believes that these works will encourage firms to expand within the area instead of re-locating with a consequent loss of employment in Nottingham. Consideration will also be given to assistance in establishing common ownership and co-operative enterprises.

Adult employment subsidy experiment ends

The adult employment subsidy, an experimental measure to reduce unemployment, is to end. The take-up of the scheme has been disappointing, explained Jim Lester, Parliamentary Under Secretary at the Department of Employment.

Mr Lester was answering a question in parliament on 29 June. He said that the adult employment subsidy was introduced on 7 August 1978 as a limited experiment in the Merseyside, Tyneside and Leeds areas to assess the effectiveness of a subsidy in assisting the long-term unemployed to obtain work.

The scheme closed for applications on 30 June.

Director fined over grant application

Douglas Turley, a director of Wirral Precision Engineering Company Ltd, has been fined £500 for an offence concerning an application for a regional development grant.

He pleaded guilty before South Sefton magistrates court sitting at Bootle to a charge under section 17(1) (b) of the Theft Act 1968 brought by the Department of Industry.

The defendant had provided the department with grant application forms and copy invoices showing expenditure of £1,012 on dates in 1978. The information given, it was alleged, was 'misleading, false or deceptive'.

First of two 800-tonne mark 9 corvettes – the *Erinmi* – being built for Nigeria by Vosper Thornycroft (UK) Ltd, a member of British Shipbuilders, on trials in the English channel. The corvettes, which are to the company's own designs, will join the two Vosper Thornycroft mark 3 corvettes completed for Nigeria some years ago.

Aviation security levy estimated for next year

Aviation security levy for 1980-81 will be around £1.10 per arriving passenger, said Norman Tebbit, Parliamentary Under Secretary of State for Trade, on 20 June.

Replying to a parliamentary question he explained that present indications pointed to a 1980–81 levy rate of about £1.10, but the rate would be fixed towards the end of the year when draft regulations were laid before parliament. Full figures for the first year were not yet available, he said, but an estimated surplus would be carried forward from 1978–79, when the levy was 80p, and deficit from the current year, for which the levy is 85p.

The Civil Aviation Act 1978 provided for transferring the financing of aviation security expenditure from the taxpayer to the industry by making a levy on the 28 larger airports in the UK. Under the Aviation Security Fund (Amendment) Regulations 1979, a levy of 85p per arriving passenger (with certain exceptions) has been payable since 1 April this year. The Department of Trade points out that it is difficult to make firm forecasts at this stage both of the amount of aviation security expenditure and of the level of traffic in the year beginning 1 April 1980, but it has agreed to give some advance indication of the likely rate at this time mainly for the benefit of the tour operators, who fix prices for 1980 summer holidays about now.

Merger proposals cleared

Secretary of State for Trade John Nott has decided, on the information at present before him, not to refer the following mergers to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

The acquisition by Armstrong Equipment of Howard Tenens Engineering (Willenhall).

The acquisition by Armstrong of a substantial minority interest in the ordinary share capital of Jenks and Cattell.

The proposed acquisition by Armstrong Equipment of the remainder of the ordinary share capital of Jenks and Cattell.

Harris Queensway Group Ltd/Hardy and Co (Furnishers) Ltd

National Enterprise Board/a 50 per cent interest in Yates Duxbury and Sons Ltd

A. G. Stanley Holdings Ltd/Morris and Blakey Wall Papers Ltd

British Steel Corporation/Herringshaw Steel Ltd

Green light for second Heysham nuclear station

Energy secretary David Howell has given the final go-ahead to the Central Electricity Board to build the 1300 MW Heysham B advanced gas-cooled reactor (AGR), it was announced on 27 June. Construction is planned for next year and the first unit is targeted for commissioning in 1986.

This is the second nuclear station on the site. The first – Heysham A – (also an AGR) – will be completed in 1982.

Sir Keith Joseph visits the North-east

Sir Keith Joseph, Secretary of State for Industry (left) against the background of a generator under construction at the Heaton works of NEI Parsons Ltd. Sir Keith visited the factory during a regional tour of the north-east on Thursday and Friday last week.

Instant coffee goes metric

Instant coffee can be sold in metric prescribed quantities from 1 July, the Metrication Board announced on 29 June. UK manufacturers have decided to go metric either immediately or during the next few months.

The most commonly available of the new packs will be 50 grams replacing 2 oz, 100 grams replacing 4 oz and 200 grams replacing 8 oz. These metric weights are nearly 12 per cent less than the old ones.

Packing in smaller sizes costs more and not all manufacturers will reduce their prices exactly in line with weight. But the major manufacturers have assured the board that their prices per pack to the grocery trade will be reduced either by the full amount of 11.8 per cent or by at least 10 per cent.

Larger instant coffee sizes include 500 grams replacing 1 lb, and 750 grams replacing 1½ lb. These metric weights are just over 10 per cent more than those they replace. Manufacturers' prices are likely either to rise strictly in line with weight or to be slightly better value for money.

Commenting on the change, Max Wood, chairman of the Metrication Board, said: 'I hope retailers will pass on in full the price cuts manufacturers are making on the 50 gram, 100 gram and 200 gram packs, which are smaller than the sizes we are used to. As a rough guide people should expect to pay about 10p in the £ less when they are buying these new sizes.'

To help people during the changeover period, the board has produced a card 'Instant coffee goes metric', available from the Metrication Board (Publications), Millbank Tower, Millbank, London SW1P 4QU.

How cuts will affect departments

Figures have been published showing how departments will be affected by the government's proposed public expenditure cuts including the 3 per cent saving in civil service pay.

Proposed revised cash limits for 1979-80 have been produced as a command paper in typescript. The Minister of State, Civil Service Department, had announced on 22 May that the civil service pay component of the 1979-80 cash limits would be reduced by 3 per cent before the limits were adjusted to accommodate the non-industrial, and subsequently industrial, pay settlements.

Cuts in specific departments programmes cannot be identified from the figures.

WDA and Morris Vulcan to form new Tri-ang company

The Welsh Development Agency has reached agreement with Morris Vulcan of Solihull to set up a new company to manufacture some of the products formerly produced by Tri-ang Pedigree at Merthyr Tydfil.

The agency and Morris Vulcan are each making £250,000 available for the joint venture. The agency will be taking shares in the new company, Tri-ang Toys Ltd, and making a loan to it. As part of its participation, the agency will be purchasing the tools and trademark of Tri-ang Pedigree which it will lease to the new company.

Production will begin as soon as possible and the company is expected to employ some 70 people in due course. The venture will be aided in getting off the ground by the interest-relief grant which the Secretary of State for Wales recently authorised on the recommendation of the Welsh Industrial Development Advisory Board.

The agency's substantial involvement in the venture will facilitate the re-development of the Tri-ang site at Merthyr while at the same time making suitable factory space available for the new company.

Ian Gray, managing director of the Welsh Development Agency, said: 'The agency has stressed throughout lengthy discussions on the future of Tri-ang that it would only be prepared to invest in a project which had clear prospects of profitability and only in conjunction with a commercial partner with a significant stake in the business.

'We are pleased that, after extensive talks with a number of companies over the last six months on a variety of propositions, we have now been able to reach agreement with Morris Vulcan which has an established reputation in the toy market.'

Skills training crucial MSC chairman

Training and retraining of workers in new and more complex skills will be crucial as Britain moves into and beyond the 1980s, said Richard O'Brien, chairman of the Manpower Services Commission.

In a recent address to the annual conference of the Scottish Institute of Adult Education at Stirling university he said that forecasts pointed to a further decline in manufacturing employment but suggested an increase in the number of jobs in the service industry sector. The main job losses would be in the unskilled occupations, while the quickening pace of technological change would increase the demand for new and more complex skills.

Shortages were already apparent in the higher engineering and computer skills and these would continue into the future, he said. These skills, which were needed across wide sectors of industry, were fast-changing and called for retraining to update them. In turn, this required a flexible but planned approach to meet future needs.

It was important, Mr O'Brien explained, to train people to agreed skill standards instead of relying on traditional time-served apprenticeship training. He stressed the importance of involving both employers and unions in moving towards a more flexible approach to agreed training standards and to wider acceptance of adult training and retraining – including the opening up of new opportunities for workers with their existing employers.

Changes in VAT and the Consumer Credit Act

A notice given by the owner of hired goods, such as a television set, to the hirer of a variation in rental covering only a change in value added tax may take effect immediately and not, as under the existing regulations, only after seven days, under regulations which came into operation on 18 June. They also provide that a notice of such a variation displayed on premises where the hirer ordinarily pays his rental in person may take the place of individual notices.

The regulations, The Consumer Credit (Notice of Variation of Agreements) (Amendment) Regulation 1979, will be obtainable from HMSO but in the meantime the text of the new provision is available on request from the Consumers Affairs Division 1, Department of Trade, Room 2602, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 3113.

Regulations changed for poultry meat

Amendments to poultry meat hygiene regulations are to come into force on 18 July. Their main purpose is to implement the requirements of EEC directive 78/50 on the immersion chilling of poultry. The regulations also implement the requirements of EEC directive 77/27 on the health marking of large packages of poultry meat, and make a very limited number of amendments to the principal regulations.

Detailed requirements are set for the immersion chilling process. Exemptions are available until 15 August 1982 for premises in operation before 1 January 1978 in relation to poultry meat for sale only within the United Kingdom. The proposals on health marking of large packages remove the need for each carcase to be individually marked in certain circumstances.

Amendments to the previous 1976 regulations clarify the requirements for joint products made from poultry and other meat, clarify the status of the official veterinary surgeon and amend slightly the powers of entry given by the regulations to bring them completely into line with those in the Food and Drugs Act.

The regulations, Poultry Meat (Hygiene) (Amendment) Regulations 1979 were laid before parliament on 27 June; copies will be available shortly from HMSO, 30p.

Small firms clinic in High Wycombe

A one-day 'clinic' for small businesses is to be held in High Wycombe on 10 July.

Organised by the Small Firms Information Centre, Luton, the clinic will be held at the Employment Office, Ward House, High Wycombe from 0900 to 1700 hours.

City Link signs with 'Red Star'

'Red Star', British Rail's premium parcels service, has negotiated a major contract with City Link Ltd for the carriage of its traffic, mainly small parcels, by rail.

The five-year contract, signed at Paddington on 20 June, is worth at least £1 million per year and is forecast to produce between £8 and £10 million by the end of its life.

BR's 'Red Star' service, which conveys parcels by nominated passenger trains and provides, in most cases, same day arrival, began in the 1960s and now conveys 5 million packages a year. City Link provides collection, delivery and transfer road services which connect with Red Star.

Government sales

17 July 1979 – Furniture

Location
Ordnance Storage and Disposal Depot, Ruddington, Notts.

Auctioneer
Arnold and Son (Dept L), 13 Market Place, Burton on Trent, Staffs (0283 64657).

A large quantity of items lying at Ruddington, Donnington, Stafford and elsewhere including MT, electrical, electronic spares and equipment. Aircraft components and ground equipment. Textiles. Scrap metals, tyres, machine tools, forklift trucks, trailers. Binoculars, watches, photographic equipment. Batteries and generators. General household furniture and other miscellaneous lots.

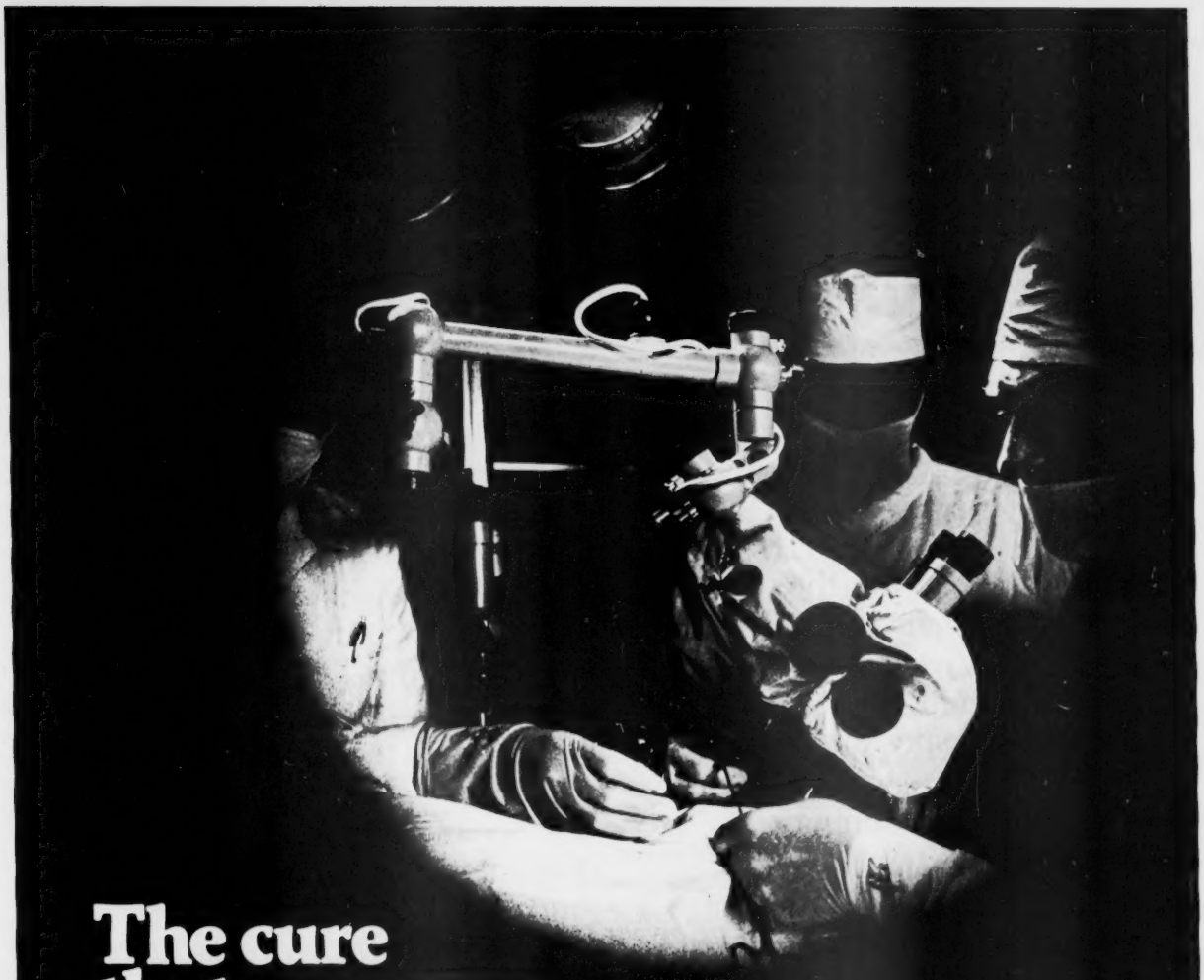
25 July 1979 – Miscellaneous stores

Location
Bristol EuroCrest Hotel, Filton Road, Hambrook, Bristol

Auctioneers: Russell Baldwin and Bright (Dept L), 20 King Street, Hereford (0432 55441)

Stores lying at Hereford, Gloucester and other places, comprising aircraft and MT spares, electronic and electrical items. Forklift trucks, platform trailers and generators. Machine tools, tyres and jacks. Furniture, carpets, clothing and other textiles including blankets, upholstery material and bed linen.

Catalogue price 40p, postage 15p



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Now you can take a pill to speak French in 24 hours.

A recent government report* suggests that British business men would be more successful abroad if they approached foreign companies in their own language.

In fact they went as far as to say, '50% of French firms give preference to foreign firms speaking French.'

Yet few British companies, it seems, invest in language training.

We can understand why.

In short, most foreign language courses are a lot of hard work.

An unfortunate state of affairs that has lead us to introduce a course of our own.

The Aiwa/Pill Language Learner. Pill stands for 'Programmed Instruction Language Learning'.

Which may sound familiar.

Since it's already made a name for itself as the fastest home-study system you can use.

Its simple books and cassettes allow you to pick up a new language from scratch in an average of only 24 study hours.

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Yet if all this leads you to believe it may be more expensive than others, you'll be pleasantly surprised.

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*BOTB, MAY 1979.

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New publications

Competition text

Professor Dennis Swann is a well-known author in the allied fields of competition and consumer protection. His new paperback, 'Competition and consumer protection', makes a readable introductory text to the whole field of anti-trust, restrictive practices, and monopolies and mergers, in the light of the policy approaches of several countries, but notably the United States. Having presented UK policy in the body of the book without seeking to reveal its strengths and weaknesses, Professor Swann goes into detail on possible reforms to British law.

Although the text is up-to-date, some of the points made are, inevitably, coloured by recent developments. The demise of the Price Commission, and the government promise to strengthen the powers of the Director General for Fair Trading through the Office of Fair Trading and the Monopolies and Mergers Commission, may be worth underlining to potential readers of Swann. The author promises no more than an introduction for second- and third-year students about to start on an industrial or marketing course yet he will surely achieve a wider audience.

His text is a comparative study of market power and having explained the various aspects of competition policy the author then analyses their probable effects on economic welfare and performance. Because it is primarily an introductory text, the book is provided with generous references and footnotes to the large numbers of monographs and articles on the subjects, so that the student can further pursue his study. As it is not easy in practice to separate competition policy from consumer protection policy, a brief chapter on consumer protection, legislation, and the organisations both government and independent, here and abroad, is included.

This is a useful and readable introductory survey of a most complex field of study. It is likely to be very widely disseminated.

Competition and consumer protection, by Dennis Swann. Penguin Books. 1979. 393 pages; paperback. £2.95 (ISBN 0 1408 0933 3).

I didn't quite catch that . . .

Noise is, perhaps, the typical contemporary form of pollution. It is unbearable to those suffering its effects, yet it tends to be all-pervasive, and in many cases inseparably linked with economic and technological development.

Christopher Penn, in his book 'Noise control', although with a local authority background, is commendably broad and sympathetic in his approach. Starting with a definition of noise, and a simple account of how we hear, he quickly encompasses the effects of noise, noise measurement and noise reduction. His range of sources quoted is wide and he manages to maintain a readable general discussion even after the first chapter when the main legal body of the text starts with a discussion of what comprises a nuisance.

The book then considers noise abatement zones, construction site and road traffic noise, and aircraft noise. A planning and development section includes development plans, planning permission and procedure for dealing with a planning application in the case of roads, aircraft and industrial premises, and finishes with enforcement of planning control and planning guidelines, noise from public works and building design as a means of control. Finally a chapter on occupational noise exposure covers such topics as the law on occupational deafness, statutory rights to benefit, assessing the existence of an occupational noise problem and a brief look at safety representatives and safety committees.

This book is going to appeal to many involved with the legal facets of noise problems whether in the factory or on the airport perimeter.

Also worth a mention in this context is the fact that the National Physical Laboratory has reprinted, with minor corrections, the booklet 'Sound absorbing materials', formerly published by HMSO.

Noise control, by Christopher N. Penn. Shaw and Sons Ltd. 1979. xxx, 308 pages; paperback. £6.50 (ISBN 0 7219 0830 6).
Sound absorbing materials, by E. J. Evans and E. N. Bazley. National Physical Laboratory, Information Services Building, 26, Queens Road, Teddington, Middx TW11 0LW. vi, 49 pages; paperback. £1.00.

China calls

The People's Republic of China 'has suddenly burst upon the world as a potential market with dynamic prospects for the immediate and even the long-term future'. But obviously there is an uncertainty on the extent and permanence of this development and its implications for exporters. A realistic picture of the market is provided in the latest report by Metra Consulting Group – 'China, business opportunities in the 1980s: consultants' appraisal of a new world market'. The report presents an analysis based on China's recently announced plans for up to 1985. It is now possible to estimate what the country will buy, and what its priorities are, to a degree unknown in the past.

The report is heavily based on the previous study by Metra, published in 1976 (reviewed in *Trade and Industry*, 4 March 1977). It adopts the same format, beginning with background geographical and historical chapters and continuing with surveys of the major branches of the economy, outlining the present state of these industries and China's plans for them in the next five years. Sections also analyse China's present overseas trade and its ability to pay for imports, and provide advice for exporters on trading methods. Appendices discuss further aspects of this relatively unknown country and also provide lists of useful addresses.

As with the previous edition, this publication is a valuable compilation of sparse and scattered information about China. Many statistical tables have been updated for this report, but a comparison between the editions reveals, disappointingly, that by no means for all has it been possible to update them. However, this detailed, practical and convenient guide looks to be worthwhile, and it will be a valuable aid to anyone considering exporting to China.

China, business opportunities in the 1980s: consultants' appraisal of a new world market. Metra Consulting Group Ltd, 23 Lower Belgrave Street, London SW1W 0NS. 1979. 287 pages; ringbound. £112.

BOTB publishes smaller project management directory

This new directory issued by the British Overseas Trade Board will help British firms win more contracts to carry out smaller overseas turnkey projects – those below £10 million.

The directory gives details of some management companies and consultants who are experienced in negotiating contracts with overseas clients and in co-ordinating the activities of sub-contractors. It should enable British sub-contractors nursing information about smaller projects on offer overseas in which they wish to participate, to approach a potential project manager and interest him in leading a bid.

Smaller Project Management Directory. BOTB. 1979. (Free to companies from Mr J. Hopkins, BOTB, Room G16, Export House, 50 Ludgate Hill, London EC4M 7HU, or the nearest BOTB regional office.)

Other publications of interest

Limited space allows us to review only a few of the many business publications which reach us every week. Among some of the more interesting recent arrivals are the following, which may be obtained either from the publishers or from local booksellers:

Containerisation international yearbook 1979. Containerisation International, National Magazine House, 72 Broadwick Street, London W1V 2BP. 1979. £19.50 (plus £1.50 postage and packing (UK)) (ISBN 0 85223 153 9).

The net cost and benefit of EEC membership: a workshop report, edited by Martin Whitby. Centre for European Agricultural Studies. 1979. £4.00 (ISBN 0 905 378 13 X).

Guide to good practice: solar heating for domestic hot water. Heating and Ventilating Contractors' Association, ESCA House, 34 Palace Court, London W2 4JG. 1979. £2.00 (post paid).

Hong Kong 1979. Hong Kong Government Office, 6 Grafton Street, London W1X 3LB. 1979. £3.25 (plus 75p for postage and packing).

Technology news

Gamma seeks to reduce software cost

A significant step in design and programming systems – project gamma – seeks to provide an answer to the challenge of soaring software costs by providing modifiability, sharing of components, reliability, and portability. The £300,000 project which builds on work undertaken by Software Sciences Ltd in several phases over the past few years, is funded one half by the Department of Industry's advanced computer technology project (ACTP) and one half by a group of sponsors currently consisting of Barclays Bank, Standard Telecommunication Laboratories, and Software Sciences.

In the Gamma system individual design decisions are written in a machine processable language instead of being hand translated in the conventional manner which is both expensive in terms of man-time and also error-prone. Reliability is achieved by reducing the error-prone human element and using a database to hold design information. This allows continuing analysis as a system is designed and built.

Design structures, as opposed to programs, are modular and thus components may be shared or re-used, thereby dramatically cutting the cost per delivered line of code. The analogy is with integrated circuits in hardware. In both cases standard components are incorporated, maybe tailored, into purpose-built systems.

The Gamma approach allows the user to define separately the application-oriented, middleware, low-level, and machine-oriented aspects of his system. This permits easy adaptation to changes in the application or in the hardware environment, a particularly important feature with the advent of micro-based and multi-processor systems.

Barclays interest is perhaps indicative of a market trend to endeavour to escape from the problems that arise from the traditional two to three year development cycle, where requirements have often changed by the time systems are implemented. Rather, the search is for much shorter development cycles plus the capability to adapt readily to changing requirements and environments.

This current phase of the Gamma project is scheduled for completion in 1980. Previous phases have been supported by the Royal Signals and Radar Establishment, ACTP, and Softwear Sciences. It is the largest single software project funded by the ACTP which was the main government support mechanism for R&D in the UK computer industry. In recent years the Department of Industry's microelectronics industry support programme and microprocessor applications project have been introduced which have reduced the role of ACTP for which no more applications are being accepted.

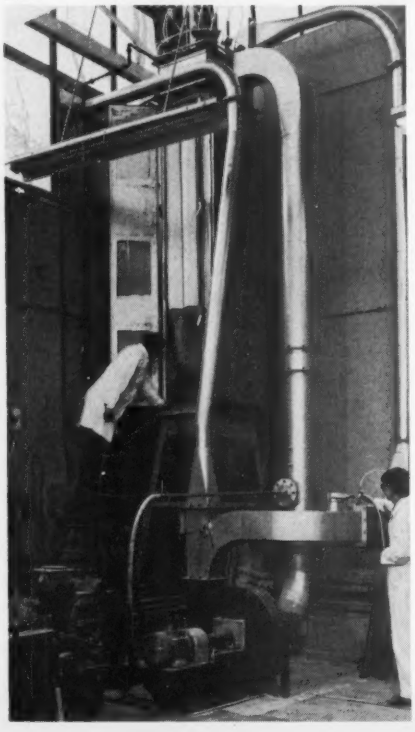
Gaseous filtration on test at Didsbury laboratory

An experimental gaseous filtration unit has recently been commissioned at the Shirley Institute, Didsbury. It will be used to gain a greater understanding of gaseous filtration and to find means of improving filter efficiency and reducing power consumption. The programme of work is being funded by £50,000 over two years from the Department of Industry and member companies of the institute.

The institute is a research association concerned with the manufacture and application of cotton, silk and man-made fibres. Textile materials, in one form or another, are an essential component of industrial filtration equipment. Power stations, and factories manufacturing cement, asphalt, iron and steel and dyestuffs form only a few examples of operations where dust and fumes have to be filtered out of air and other gases before they can be vented into the atmosphere.

The new equipment accommodates nine 3 metre filter bags which can be evaluated at temperatures up to 200°C and at airflow rates up to 30 cubic metres per minute – conditions which will effectively simulate those found in industrial use. At present the work is being concentrated on a range of nonwoven fabrics.

Checking out the nine-bag, reverse jet, filtration unit.



NRDC marks up 30 years of innovation

Hovercraft, the ICL 1900 series computers, glass-reinforced cement, fluidised-bed combustion and the antibiotic drug cephalosporin are among the major technical achievements of the National Research Development Corporation in 30 years of promoting technological innovation in the UK which it celebrated on 28 June. The estimated value of UK output resulting from NRDC's current projects and licences is now running at £100 million per year.

The total number of current projects in which the corporation has invested is now about 450. Half of this number are in the public sector, mainly universities, and the other half with private industry. About half of the 230 industry projects are with small firms employing fewer than 200 people. Nearly 20 per cent of the industry projects are with start-up companies.

NRDC is a public corporation, set up by act of parliament in 1949. Today its two main functions are to licence inventions derived from UK public-sector sources, such as universities, research councils and government establishments, and to provide finance for technological innovation by industrial companies. It is now entirely self-financing, since the remaining £6.7 million of loans from the Department of Industry were repaid earlier in March.

The corporation has been profitable throughout the 1970s, the bulk of these profits coming from its licensing activities rather than from its investments with industrial companies on which it just about breaks even. Since its formation it has received about 40 000 inventions or proposals from sources ranging from academic researchers to giant industrial companies. It has negotiated over 1800 licence agreements in the UK and 275 overseas. Currently the corporation has a portfolio of 6000 patents throughout the world.

Canada buys British fluidised-bed technology

A further contract for the design of a coal-fired fluidised-bed heating plant, to be located at a military base in eastern Canada, has been awarded to Coal Processing Consultants Ltd (CPC), the coal utilisation consultancy jointly owned by the National Coal Board and the Babcock and Wilcox Group.

The contract, awarded by the Canadian Federal Department of Energy, Mines and Resources (EMR) to Intercontinental Engineering Ltd of Vancouver, nominates

CPC as sub-contractor to provide the design based on fluidised-bed technology developed in Britain.

During the first phase of this project – completed in 1978 – CPC prepared a conceptual design for a boiler to produce 18 000 kg/hr of steam using the fluidised-bed combustion technique which allows a wide range of low quality fuels to be burned cleanly and efficiently. At the site chosen by EMR, low-grade coal with up to 7 per cent sulphur is available, and CPC has developed the boiler design to meet operating and environmental performance targets while at the same time allowing up to 30 per cent of the fuel imput to be in the form of wood waste.

The second phase of the work, now being undertaken, involves the integration of two fluidised bed boilers into a complete heating plant with the possibility of steam turbines being added for electrical power generation. The plant is scheduled to be commissioned in late 1981. From the point of view of EMR it will be the largest demonstraition in Canada of a technology with great potential application in the exploitation of coal, Canada's most abundant fossil fuel.

Oil and computers mixed by BNOC

International Computers Ltd (ICL) and the British National Oil Corporation (BNOC) have signed a £2.5 million agreement to develop large computer systems for the oil industry. BNOC has bought an ICL 2976 computer and operating systems which will be set up to do work currently being subcontracted to a computer bureau.

The idea is that a team of ICL programmers will gain experience of systems needed in the oil industry so that the computer company will be able to improve its experience and position in this important market. One task will be to adapt applications programmes written by consultants and independent software companies to ICL machines.

The project is expected to take about two years, during which expenditure on software and hardware could rise to between £4 million and £5 million. ICL believes that the export potential for hardware and associated systems will be considerable.

OU and Insac to develop electronic teaching systems

Microprocessor-based teaching and training systems are to be developed by the Open University and Insac International who have signed a long-term research and development agreement. The agreement provides for an initial research and development phase and continues with manufacture and exclusive worldwide marketing arrangements.

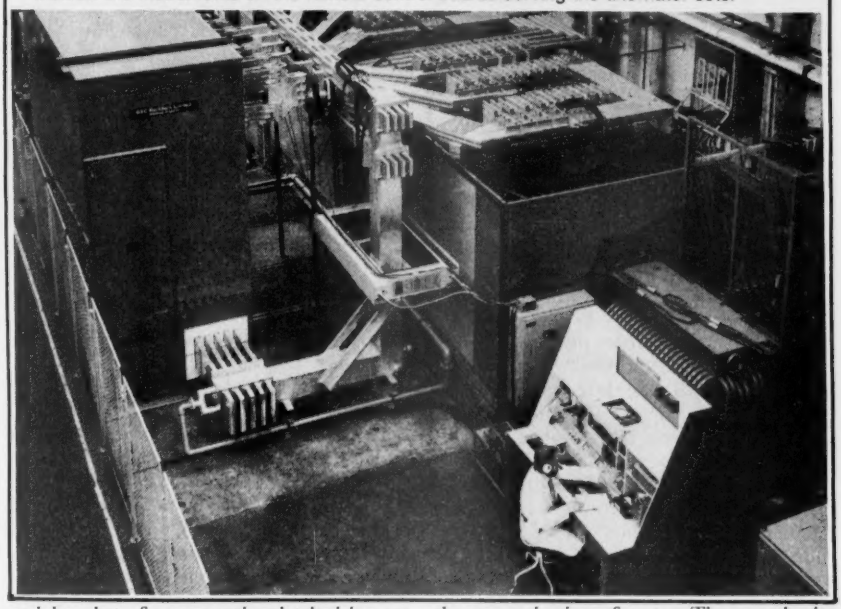
The complex pattern recognition software of the university's display teaching system, Cyclops, forms part of the agreement, and the university and Insac recognise the great potential for such systems in industrial training. The team will also explore the relationship with viewdata systems.

Cyclops is a device which is connected to the aerial socket of a conventional television set and displays graphical information accompanied by a sound track. Both sound and visual data are stored on cassette tapes produced using a computer technique developed by the university.

The device may also be used in conjunction with a light-pen for drawing on the television screen, and two or more systems can in principle be linked via the public switch telephone network. This will enable students to participate in a tutorial group in which the tutor and students are all in separate locations. It is particular suitable for Open University students in isolated regions, where attendance at a local study centre is difficult, or if travel is otherwise a problem.

GEC Rectifiers extends it high current test facilities

Recently extended high current test facilities at GEC Rectifiers Ltd are designed to handle the demand for increased ratings of rectifier equipment. The new plant is capable of supplying full load current continuously to si- to 12-pulse rectifier equipments with rated outputs up to 100 kA dc. Accurate calibration and checking of instrumentation on the equipment is provided by precision metering incorporated in the plant for measurement of dc current up to 125 kA. A mobile control desk with closed circuit tv enables operators in the rectifier test area to monitor the instruments on the remote control boards serving the alternator sets.



Molten metal explosions can kill

More research is needed into the precise mechanism behind explosions, sometimes of catastrophic proportions, which can occur when molten metal is inadvertently mixed with water, according to two reports published recently by the Health and Safety Executive. None of the major explosions have occurred in the UK, but overseas studies indicate the destruction that can result.

A list quoted of 75 explosions in north America shows that 32 people were killed and 300 injured. One aluminium explosion alone, which wrecked a whole foundry killing five people and injuring 33, is estimated to have been the equivalent of 200 kg of tnt.

Both reports, the last in a series of six by a sub-committee of the joint standing committee on health and safety in foundries, explain that molten metal explosions are associated with the vapourisation of water. They emphasise that further work is clearly necessary both in pilot-scale field testing and in the laboratory.

Pilot-scale experiments carried out by the University of Aston and practical experience form the basis of the report 'Safety during semicontinuous and continuous casting of copper and copper-based alloys' (HMSO, 80p). Molten metal explosions can involve any metal in its molten state and the report stresses that the proposals should be read in conjunction with the other reports in the series.

Precautionary measures recommended range from the installation of fail safe control systems and of suitable shutdown valves preventing the accidental ejection of molten metal, to ensuring the quality of all cooling water and preventing any water lodging in the wrong areas. Matters of general safety are also briefly outlined and the importance of protective clothing and adequate operator training is emphasised.

When explosions do result, they are usually trivial enough to be called 'sputtering', although they may well cause injury to operators, However, the second of the two reports, 'Molten metal and water explosions' (HMSO, £1), emphasises that there is always the potential risk of an explosion violent enough to kill or seriously injure workpeople and to cause extensive damage.

Violent explosions have been known to occur not only when metal is being melted or cast, but also during electro vacuum arc melting, electro-slag welding and when liquid slag and water are mixed. A great deal of research has been carried out into devising methods of keeping molten metal and cooling water apart. The report adds that even if the two do mix, an explosion can be prevented by giving careful thought to aspects such as plant design and safe systems of operation and maintenance.

New products

Improved extrusion of coated welding rods

Production of flux coated welding electrodes can be carried out more efficiently by equipment introduced by Havelock Equipment Ltd. The company, the only UK manufacturer of welding electrode flux coating extrusion equipment, offer a range of extrusion production lines with capacities from 500 to 3000 tonnes of coated electrodes per year.

The equipment is the result of a £½ million development programme being undertaken by the company to improve the production efficiency and reduce the maintenance and overhaul cost of its products. Part of the cost of this programme is being met by the Department of Industry under its product and process development scheme.

The extrusion system can be supplied as a complete line or an independant units, consisting of a slug press, automatic wire feeder, an extruder and transverse and brushing conveyor. The complete line will accept cut and straightened electrode wires of any material and will automatically coat them with a controlled quantity of flux and end brush them ready for the baking oven.

The extruder has an integral hydraulic sustem with manifold mounted valves for ease of maintenance. Electro-mechanical drives are used for the wire feeder and conveyor system, and all belts can be changed without dismantling shafts or pulleys. The brushing module is separately floor mounted to isolate vibration.

A new automatic eccentricity meter has also been developed by the company. This provides continuous non-contact measurement of true eccentricity of the axis of the rod to the outside diameter of the flux. Once the permitted eccentricity is selected, electrical outputs from the meter can either warn the operator or stop the line for correction adjustment if the eccentricity limit is exceeded.

In addition to the flux coating equipment, a welding electrode flux stripping and wire straightening machine is now available from Havelock Equipment. This enables scrap rods, damaged during baking and packaging, to be reclaimed.

Further information: circle 530

Compact digital terminal for the battlefield

Messages can be transmitted visually over any voice communication channel under battle conditions with a compact and portable device developed by Plessey Avionics and Communications Ltd. The digital message terminal (DMT) type 1641 is an addition to a radio system, not a radio itself. The operator uses a small keyboard to prepare messages which, after he has checked them for accuracy, can be transmitted in a digital form at audio frequencies over the radio or telephone network.

Plessey's system is fast, with complicated messages able to be sent in a matter of seconds so that lines can be quickly cleared and the danger of detection through radio direction finders minimised. Messages can be addressed to specific terminals and, additionally, stored for later transmission. The store is also used to hold received messages until they can be accepted. Received messages are displayed on a moving 'bill board' visual presentation which is also used for monitoring outgoing messages.

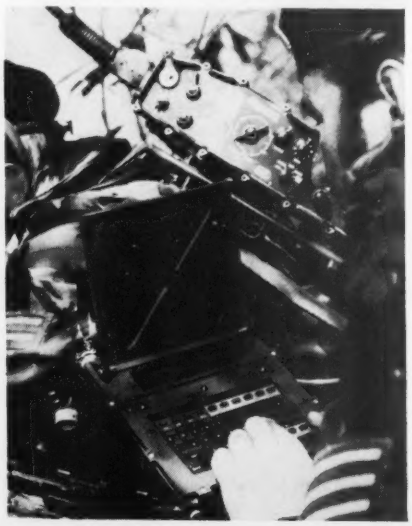
The DMT employs a microprocessor within the terminal to undertake a number of message handling functions. This, together with the storage facility, enables burst transmissions to be used ensuring a much more efficient use of the radio spectrum. Message preparation can be undertaken at sites remote from the radio; it is only necessary to connect the DMT to the radio during the actual transmission of the messages.

The equipment, weighing 2.5 kg, has been designed for use either in the man-portable or base-station role. No specialised communications equipment is needed, the DMT is simply plugged in to the head- or hand-set socket of the radio. A printer can be connected so that local copies of both received and transmitted messages can be made.

The equipment makes extensive use of modern digital integrated circuit techniques and miniature components to enable the main functions to be housed in a modular form. This design approach enables ease of maintenance and repair together with high reliability.

Further information: circle 531

The days of garbled messages are numbered.



Rank Xerox introduces second low-volume copier

Xerox 2600 desk-top copier.

A desk top copier for the small business or for decentralised use in a large organisation has been introduced by Rank Xerox (UK) Ltd. The Xerox 2600 is a compact, table-top machine which is claimed to be easy to operate, versatile and reliable. It is the second low volume machine to be introduced by the company this year and further extends the Rank Xerox range in the fast expanding low volume market.

Based on the Xerox 3100 range, the 2600 gives copy quality and reliability of a high standard for low volume use up to 5000 copies per month.

Easy to use, it has just two controls, a copy counter and a print button. Up to 39 copies may be selected which are produced at a rate of 12 per minute. The specially designed platen cover allows easy copying of bound documents. Photographs, paste-ups, pencilled notes and even three dimensional objects can all be copied clearly. The 2600 will copy on to coloured paper, letterheads, pre-printed forms, pre-punched paper, self-adhesive labels and transparencies for overhead projectors.

Further information: circle 532

Weigher control reduces bagging losses

Richard Simon and Sons Ltd has developed a self-optimising control for its high-speed gravity- and belt-fed net weighers to ensure that containers are packed to fine limits and product give-away is kept to a minimum. The device compiles with the European community's legislation on average weight, and is suitable for countries with minimum weight laws

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

where the net weight of a pack must not be below the declared weight.

Encased in a lockable, sealed cabinet, the controller comprises a basic weighing section and a correction unit. A high-accuracy load-cell is employed to transmit to the first section the weight required in the goods pan. When this weight has been reached, the controller cuts off the infeed of produce, actuates discharge of the load and re-starts the filling cycle.

The correction unit acts as a built-in check-weigher. It detects any tendency of weighments to fluctuate from the weight desired and feeds back appropriate corrections to the basic weighing section. The controller's automatic, self-optimising function allows the weigher to correct, without operator intervention, for changes in material properties such as density and fluidity and for dust build-up on the weigh pan.

An optional print-out facility enables weighments to be monitored and obviates the need for manual checkweighing; it also provides a permanent weighments record and permits immediate visual assessment of performance. As well as forming part of the company's bagging-off machines in capacities up to 50 kg, the self-optimising equipment can now be supplied as a kit to existing customers to convert their equipment.

Further information: circle 533

Air purifier protects work stations from toxic dust and fume

Colt International Ltd has introduced a high volume air purifier for commercial and industrial use. Called the Colt Conditionair 1700, the unit provides 'whole bench' protection for up to three workers, cleaning and recirculating the air in the work place. The system gives passive protection in that it does not require worker participation. Toxic dusts and fumes are captured and removed before penetrating the breathing zone.

Conditionair is designed to meet different on-site requirements by utilising a range of bench-mounted collection slots. Up to three slots may be connected by varying sizes of flexible ducting. Valuable heat is retained by cleaning the air and recirculating it. Installation costs are minimal as the Conditionair does not require bulky ducting trailing away to the exterior. The unit and ducting are mobile and can be used anywhere in the factory.

The Conditionair is available in single and three-phase versions and will handle 1700 m^3/h of air. Washable or disposable filters are incorporated, capturing particles down to 0.6 micron in size. Filter efficiency is 90 per cent against BS 3928 sodium flame test. Filter life depends entirely upon the application but would typically range from 750 hours to over 3000 hours.

Protection from dust and fumes without the need for hoods or masks.

Further information: circle 535

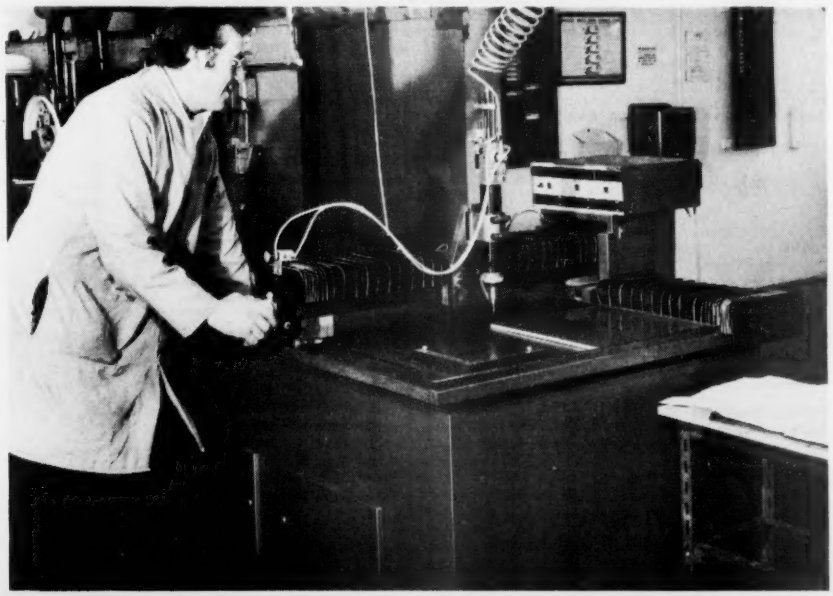
Precision work on sheet materials

Vickers Ltd have been appointed exclusive distributors of the two-axis marking-out, drilling and inspection machines manufactured by Measurite Ltd of Kettering. These machines have been designed specifically for the accurate marking-out, drilling and inspection of all types of panelling and circuit board work in the electronics industry and all industries employing sheet metal panelling.

There are four standard sizes with working areas of 1100 mm by 660 mm to 2500 mm by 1900 mm, each machine being equipped with two-axis Thorn Multipak electronic digital precisioning. High grade bearings give effortless movement, zero stutter and zero backlash on the X and Y measuring arms. Multipak check-axis, computing absolute position left or right of original datums and a memory display through dial-in facility is included. Linear positional accuracies are approximately ±0.0005 in or 0.01 mm over any 710 mm × 710 mm area. Table flatness is within 0.002 in and positional repeatability is ±0.0005 in or 0.01 mm.

Further information: circle 534

Marking-out, drilling and inspection of sheet material to 0.01 mm.



Electric linear actuators give improved control of diesel engines

Portescap UK has introduced a range of ac and dc-operated electric linear actuators – the Magpush SE/D series – which have been specifically designed for controlling the speeds of diesel engines and similar motors used for auxiliary generators. They are suitable for replacing Bowden-type cables, giving better repeatability over long lengths and avoiding load surges by providing smoother speed control.

The actuators can be powered by ac mains or 12/24 V dc power sources, making them suitable for field use and for situations where remote control from a central console or driving cab is required. They require little maintenance, a periodic cleaning and light oiling of the push rod, and have rugged reliability and a long life. Casings and push rods are made from non-corrodable materials and resist penetration by dust and dirt.

In operation, the push rod is connected via a transmission link to the engine's speed control lever – either the regulator of its injection pump for slow speed applications or the fuel injector valve for high speeds. Push-pull forces of up to 30 kgf are delivered by these actuators, which have screwdriver-adjustable stroke lengths of between 5 and 70 mm, limited by two microswitches located at the rod's end positions.

Several advantages are claimed for using an electric linear actuator in this kind of application. It is easy to install, is remotely controllable by means of a simple changeover switch, is inexpensive to run, involves no complex or costly pneumatic or hydraulic power lines, and is self-locking when at rest. Slow speed versions are ideal for providing very fine control over a small section of the speed band, whereas the fast speed versions allow control from no load through to maximum speed.

Further information: circle 536

Parliament

Monday, 25 June

Selective financial assistance

Michael Meacher (Oldham West) asked the Secretary of State for Industry how many companies had so far approached him for industrial assistance.

Mr Mitchell said in the period from 4 May to 8 June the Department of Industry had received 137 applications for regional selective assistance under section 7 of the Industry Act 1972 and 75 applications under the schemes operated by the Department of Industry under section 8.

Effect of VAT on tourism

Robert Hicks (Bodmin) asked the Secretary for Trade if he was satisfied that prospects for the tourist industry for the remainder of the year were not being harmed as a result of the introduction of a 15 per cent rate of value added tax and what plans he had for monitoring any changes that might occur in the extent and pattern of future tourist demands in the light of these tax increases.

Mr Tebbit said he had no reason to believe that the prospects for domestic tourism would be harmed by the increase in the rate of value added tax, which should not be viewed in isolation from the increase in personal disposable incomes resulting from the income tax cuts proposed by the Chancellor of the Exchequer.

As for overseas visitors, the international passenger survey (on which government statistics of the numbers of foreign visitors and their expenditure were based) would enable the government to monitor any changes and so would the home tourism survey operated by the tourist boards. Changes in the volume and value of tourism might result from other reasons than an increase in VAT. The tourist boards also, as part of their normal activity, made their own estimates of future demand, taking into account the relevant factors.

Payments from Nigeria

Robert Taylor (Croydon North West) asked the Secretary for Trade whether he or the Export Credits Guarantee Department had recently received any protests from exporters at the delays in receiving payments from Nigeria.

Mr Parkinson said he had and he was aware that administrative procedures in Nigeria were delaying transfer of payment to many exporters, some of whom have expressed concern to the Export Credits Guarantee Department. The delays, usually between two and four months but sometimes longer, arose partly from additional exchange control and other requirements which the Nigerian authorities had introduced this year to regulate imports. Compliance with such regulations was a necessary precondition for acceptance of liability by ECGD.

Tankers and the Scottish coast

John MacKay (Argyll) asked the Secretary of State for Trade if he would state his policy on large oil tankers sailing up and down the west coast of Scotland.

Mr Tebbit said following discussions with the General Council of British Shipping, the Scottish Office and the Scottish local authorities concerned, his department had undertaken to develop for approval by the Inter-Governmental Maritime Consultative organisation a traffic separation scheme for the Minches. The government would also be considering whether it would be practicable to put forward a recommendation that large laden tankers should stay to the west of the Hebrides.

Bargain offers

The answer given to Sir Donald Kaberry on Friday 15 June on bargain offers should have read:

Mr Eyres intended to retain this order as he believed it would be of genuine benefit to consumers by providing protection from misleading claims while at the same time allowing businesses to compete honestly through the use of a wide range of informative claims.

Tuesday, 26 June

Japanese car imports

Renée Short (Wolverhampton North East) asked the Secretary of State for Trade if he would take steps to curtail immediately the flood of Toyota and Nissan cars currently being imported.

Mr Parkinson said the volume of imports of Japanese cars in the first five months of this year needed to be related to the exceptionally high demand for cars in this period. In terms of new registrations, the share of the UK market held by Toyota and Datsun and by Japanese cars generally had fallen, compared with the same period last year. His department was monitoring the position carefully in the light of inter-industry discussions and he saw no reason to intervene at this stage.

UK investment in US

Robert Dunn (Dartford) asked for the publication of the value of British direct investments in the United States; what percentage that made of total foreign investment in the United States; and if a comparison could be issued for five years prior to the date of figures issued.

Mr Parkinson said the book value of direct investment in the United States, as estimated by the United States Department of Commerce, was £3,303 million at the end of 1977 and £2,325 million at the end of 1973. This represented 18.6 and 26.3 per cent respectively of the book value of foreign direct investment in the United States. Comparable figures were not available for 1972.

Ministers

Department of Industry

Secretary of State: Sir Keith Joseph
Ministers of State: Adam Butler
Lord Trenchard
Parliamentary Under-Secretaries of State: Michael Marshall
David Mitchell

Department of Trade

Secretary of State: John Nott
Ministers of State: Sally Oppenheim
Cecil Parkinson
Parliamentary Under-Secretaries of State: Norman Tebbit
Reginald Eyre

Wednesday, 27 June

Import controls

Renée Short (Wolverhampton North East) asked the Secretary of State for Trade what circumstances would cause him to seek the introduction of import controls.

Mr Parkinson said the government was prepared to consider the imposition of temporary controls in cases where sudden surges of imports were a cause of disruption and loss of jobs.

NEB shareholdings

Michäle Grylls (North West Surrey) asked for a list of the shareholdings held by the National Enterprise Board on 27 June 1979, showing the number and type of shares held, the percentage of the equity this represents, the cost of each to the board, and where appropriate the market value of the shares on 24 June.

Michael Marshall said at 27 June 1979 the following shareholdings had been announced by the NEB:

Company	Number and description of shares held by NEB	Percentage of nominal value and total equity	Cost (£'000)	Stock exchange quotation (closing price 25 June) where available
Agemaspark Ltd	3 700 £1 ordinary	30.0	100	
	50 000 £1 redeemable preference	Not equity	50	
Aqualisa Products Ltd	4 000 £1 ordinary	40.0	4	
	65 000 £1 redeemable preferences	Not equity	65	
Automation and Technical Services (Holdings) Ltd	45 000 £1 ordinary	30.0	50	
	100 000 £1 redeemable preference	Not equity	100	
Barrow Hepburn Group Ltd	1 000 000 25p ordinary	4.1	450	33p
BL Ltd	1 144 554 026 50p ordinary	98.9	695 523	20p
British Tanners Products Ltd	2 000 000 £1 ordinary	50.0	2 000	
Brown Boveri Kent Ltd	10 856 585 25p ordinary	20.0	3 293	47p
BTB (Engineering) Ltd	30 000 £1 redeemable preference	50.0	30	
Bull Motors Ltd	1 220 000 £1 ordinary	100.0	1 220	
Cambridge Instrument Co Ltd	712 684 255 1p ordinary 4 261 757 10p ordinary	87.0	8 020	
	50 000 000 1p ordinary	Not equity	500	
R. R. Chapman (Sub Sea Surveys) Ltd	50 000 £1 ordinary	47.2	50	
Computer Analysts and Programmers (Holdings) Ltd	1 372 760 10p ordinary	29.9	549	
Computer and Systems Engineering Ltd	349 750 5p ordinary	49.9	882	
	15 200 £1 redeemable preference	Not equity	48	
Data Recording Instrument Co Ltd	3 970 337 £1 ordinary	63.1	3 977	
	1 000 000 £1 redeemable preference	Not equity	1 000	
The Energy Equipment Co Ltd	75 000 £1 preference	42.9	75	
	200 000 £1 preference 225 000 £1 preference	Not equity	300 225	
Fairey Holdings Ltd	18 000 000 £1 ordinary	100.0	18 000	
Ferranti Ltd	10 666 666 50p ordinary	50.0	6 933	394p
Hemmings Plastics Ltd	100 000 £1 redeemable preference	Not equity	100	
Herbert Ltd	118 720 948 25p ordinary	100.0	44 468	
Hird Brown Ltd	250 000 £1 redeemable preference	Not equity	250	
Hydraroll Ltd	4 500 £1 ordinary	48.9	5	
	60 000 £1 redeemable preference	Not equity	60	
ICL Ltd	8 342 250 £1 ordinary	25.0	12 956	452p
Inmos Ltd	370 000 25p ordinary	67.3	92	
BL Ltd	65 000 £100 preference	Not equity	6 500	
	294 313 892 50p ordinary (partly paid)	73 578		
Burndept Electronics Ltd	510 000 £1 'A' voting	51.0	510	
George P. Brown (Holdings) Ltd	575 000 £1 ordinary	49.0	575	
Duo Rubber and Engineering Co Ltd	34 598 £1 ordinary	49.0	35	
	125 000 £1 redeemable preference	Not equity	125	
Ferranti Resin Ltd	294 000 £1 ordinary	49.0	294	
Innotron Ltd	1 308 £1 ordinary	29.0	44	
INSAC Data Systems Ltd	3 150 000 £1 ordinary	100.0	3 150	
J and P Engineering Ltd	45 000 £1 ordinary	33.3	100	
Keland Electrics Ltd	100 000 £1 ordinary	100.0	100	
Mayflower Packaging Ltd	60 000 redeemable preference	33.3	60	
	60 000 redeemable preference	Not equity	60	

Company	Number and description of shares held by NEB	Percentage of nominal value and total equity	Cost (£'000)	Stock exchange quotation (closing price 25 June) where available
The Mollart Engineering Co Ltd	46 822 £1 ordinary	70.6	382	
Monotype Holdings Ltd	25 000 10p ordinary	37.5	250	
Negretti and Zambra Ltd	960 000 25p ordinary	29.8	710	
	460 622 £1 redeemable preference	Not equity	461	
Newtown Securities (Northern) Ltd	125 000 £1 ordinary	50.0	125	
North-East Audio Ltd	54 450 £1 ordinary	49.8	99	
	340 000 £1 redeemable preference	Not equity	340	
Pakmet International Ltd	23 300 £1 ordinary	34.4	47	
	200 000 £1 redeemable preference	Not equity	200	
Powerdrive PSR Ltd	20 000 £1 ordinary	40.0	20	
	100 000 £1 redeemable preference	Not equity	100	
	150 000 £1 redeemable preference		150	
Rolls-Royce Ltd	203 000 000 £1 ordinary	100.0	203 000	
Sandiacre Electric Ltd	30 000 £1 ordinary	30.0	40	
	125 000 £1 redeemable preference	Not equity	125	
Francis Shaw and Co Ltd	1 400 000 20p ordinary	Not equity	546	
Sinclair Radionics Ltd	275 000 £1 ordinary	73.3	650	
	200 000 £1 preference	Not equity	4 200	
	4 000 000 £1 redeemable preference			
Systems Designers International Ltd	3 060 £1 ordinary	26.0	184	
Systems Programming Holdings Ltd	300 £1 'V' voting	79.9	600	
	600 000 £1 'D' non-voting			
Systime Ltd	862 £1 ordinary	28.1	558	
	476 £1 preference			
Twinlock Ltd	7 123 000 10p ordinary	33.3	997	
United Medical Enterprises Ltd	4 619 440 £1 ordinary	70.0	5 774	
Vicort of London Ltd	9 608 £1 ordinary	49.0	10	
	130 392 redeemable preference	Not equity	130	
Legibus Twelve Ltd	7 201 £1 ordinary	100.0	7	
	129 609 £1 preference	Not equity	130	
Logca Holdings Ltd	32 240 £1 ordinary	20.0	1 171	
Logica Securities Ltd	20 000 £1 ordinary	20.0	1 000	
Logica VTS Ltd	14 438 25p ordinary	43.0	1 800	
Middle East Building Services Ltd	18 750 £1 ordinary	29.6	19	
Nexos Office Systems Ltd	113 190 £1 ordinary	100.0	113	
Microform Communications Ltd	194 444 £1 ordinary	28.0	310	
	165 000 redeemable preference	Not equity	165	
Rigby Electronics Ltd	75 000 £1 redeemable preference	Not equity	75	
Sapling Enterprises Ltd	500 £1 ordinary	50.0	1	
Technical Resources (Equipment) Ltd	36 750 £1 ordinary	24.5	37	
	200 000 £1 redeemable preference	Not equity	200	
Thermax Ltd	350 000 £1 redeemable preference	Not equity	350	
Wholesale Vehicle Finance Ltd	6 471 250 £1 ordinary	77.5	6 471	
Yates Duxbury Ltd	350 000 £1 ordinary	50.0	875	

Polish ships deal

Michael Grylls (North West Surrey) asked how much the Department of Industry had paid to British Shipbuilders under the Polish ships deal, confirmed in the department's letter of 17 March 1978, what was final offer based on retailed cost estimates from British Shipbuilders subsidiaries, and what was British Shipbuilders forecast of the outturn on this order.

Mr Marshall said a payment of £14 million had been paid to British Shipbuilders. A final offer had not yet been made but would not, in any case, exceed £28 million. British Shipbuilders was forecasting a loss on this order but it was not possible to quantify this until the contract had been completed.

Trade in coal

Richard Shepherd (Aldbridge-Brownhills) asked how much coal had been imported and exported in the most recent annual period for which figures were available and what were the comparable tonnage totals in each of the previous 10 years.

Mr Parkinson gave the following information:

Thousand tonnes

	Imports	Exports		Imports	Exports
1968	2	2 704	1974	3 541	1 850
1969	2	3 442	1975	5 070	2 182
1970	79	3 363	1976	2 836	1 434
1971	4 230	2 695	1977	2 439	1 941
1972	4 996	1 749	1978	2 352	2 266
1973	1 668	2 693	April 1978 – March 1979	2 166	2 086

Source: UK Overseas Trade Statistics (SITC(Rev 2) Subgroups 322.1 and 2 and corresponding items in earlier years). Note Post-1970 figures reflect the relaxation of import controls.

Thursday, 28 June

Supplies of liquefied gas

John Fraser (Lambeth, Norwood) asked the Secretary of State for Trade, if he would refer to the Monopolies and Mergers Commission the supply of liquefied gas.

Mrs Oppenheim said the secretary of state was considering making a reference to the commission of the supply in the UK of liquefied petroleum gas in containers of not more than 50 kg capacity and not less than 150 g capacity.

Export prices

Austin Mitchell (Grimsby) asked what were the figures for: a the index of comparative export prices for manufactures, b the index of the terms of trade, c the index of comparative labour costs, d the index of wholesale prices, e the index of export prices for manufactures, and f the index of import prices for manufactures, for each quarter of 1975, 1976, 1977, 1978 and 1979.

Mr Parkinson gave the information below:

1975 = 100

	Relative export prices [1]	Terms of trade [2]	Relative normal unit labour costs [3]	Wholesale prices [4]	Export prices of manufactures [5]	Import prices of manufactures [6]
1975						
1st qtr	100.1	98.7	n.a.	93.7	95	95
2nd	99.6	100.4	n.a.	98.5	97	97
3rd	100.1	100.8	n.a.	102.1	102	102
4th	100.1	100.1	n.a.	105.7	106	106
1976						
1st qtr	102.0	100.5	n.a.	110.3	111	110
2nd	96.4	98.5	n.a.	114.5	117	119
3rd	97.9	99.4	n.a.	119.2	124	126
4th	94.2	98.2	84.9	125.2	132	136
1977						
1st qtr	98.8	99.1	88.8	133.0	136	138
2nd	102.2	100.6	88.1	139.6	142	141
3rd	103.6	101.3	88.1	143.8	146	143
4th	107.2	102.4	90.2	145.8	148	144
1978						
1st qtr	110.5 p	105.7	94.7	149.2	151	144
2nd	104.2 p	104.9	92.2	151.8	154	150
3rd	107.4 p	106.1	94.1	154.8	159	154
4th	n.a.	106.9	94.3	157.3	163	158
1979						
1st qtr	n.a.	107.7	n.a.	161.6	168	161

[1] The unit value of UK exports of manufactures divided by a weighted average of the unit value of competitors' exports of manufactures, both expressed in a common currency. [2] Export unit value index as a percentage of the import unit value index, both covering total trade, on a balance of payments basis. [3] UK normal labour costs per unit of manufacturing output divided by a weighted average of competitors' normal unit labour cost, both series being expressed in a common currency and adjusted for variations in productivity about long-term trends. The IMF has recently revised this series; consistent earlier figures are not yet available. [4] UK wholesale price index of home sales of all manufactured products. [5] Export unit value index of manufactures (sections 5-8 of SITC(Rev 2)) in £ sterling terms. [6] Import unit value index of manufactures (sections 5-8 of SITC(Rev 2)) in £ sterling terms. n.a. Not available. p Provisional.

NEB: acquisitions and disposals

Michael Grylls (North West Surrey) asked for a list of the number of shares, the names of the companies and the cost of the shares acquired by the National Enterprise Board since 4 May 1979, and the shares including the names of the companies and the consideration, disposed of by the board since that date.

Mr Marshall said the board had announced the following acquisitions, but no disposals, since 4 May 1979:

Company	Number of shares	Cost £'000
BL Ltd	294 313 892 50p ordinary (partly paid)	73 576
Innotron Ltd	1,308 £1 ordinary	44
Legibus Twelve Ltd	7,201 £1 ordinary	7
	129 609 £1 preference	130
Microform	194 444 £1 ordinary	310
Communications International Ltd	165 000 £1 redeemable preference	165
Yates Duxbury Ltd	350 000 £1 ordinary	875

Friday, 29 June

Cutlery industry

Frank Hooley (Sheffield, Heeley) asked the Secretary of State for Industry what progress was being made by the working party on the cutlery industry; and when they were expected to report.

Mr Mitchell said that the working party had fully considered the joint study carried out in 1978. It had set up sub-groups which were preparing proposals for action for each sub-sector of the industry, for examination by the working party, which aimed to complete its report in the autumn.

Air fares

Eldon Griffiths (Bury St Edmunds) asked the Secretary of State for Trade what steps he was taking to assist British private airlines in their bids for lower air fares between London and other west European countries.

Mr Tebbit replied that the government was considering with the Civil Aviation Authority what action would be appropriate in the light of the unhelpful attitude adopted by the French, Dutch and Belgian authorities to the new low fares proposed by British Caledonian Airways on their existing services to Paris, Amsterdam and Brussels. It was anxious to see that air fares were as low as possible consistent with the viability of efficient airlines. He said it would not be proper for him to comment on the applications made to the Civil Aviation Authority for new low fares services to many European destinations by airlines not at present holding licences to serve those destinations.

European community news

Britain receives more funds from European Investment Bank . . .

European Investment Bank loans to UK industry are up again this year following a drop last year. Demands for the first half of 1979 have already reached the total figure for last year when the UK received £286 million – only 22 per cent of available funds. Italy came first with 43 per cent.

The EIB's annual report, published this month, shows that last year total loans amounted to 2,188 million European units of account (mua) compared with 1,571 mua in 1977, an increase of 39 per cent. Loans to member states totalled 1,966 mua.

After two years running in which the UK received the largest volume of finance the drop last year to second place was due to a reduction in demand for the bank's loans by nationalised industries who had previously been large borrowers.

The report states that the greater part of last year's funds went towards projects located within member countries. Part was also provided for investment contributing to the economic development of various Mediterranean, African, Caribbean and Pacific countries with which the community has entered into financial co-operation agreements.

To sustain growth in the bank's activity the subscribed capital was doubled by decision of the board of governors in June last year. The effect of this increase was to raise the ceiling for outstanding loans which may not exceed 250 per cent of subscribed capital.

and £7.2 million EIB loan for Yorkshire pump factory

A loan equivalent to £7.2 million has been granted by the European Investment Bank to Sulzer Bros (UK) Ltd to cover half the cost of a new factory in Leeds which will produce centrifugal pumps and pumping equipment. The loan is for 10 years at 9.15 per cent.

The company is involved in a wide range of engineering activities and its pump division operates at present from a site, which has become increasingly inadequate, near the centre of Leeds. To expand output and employ more modern production techniques the division is moving to new premises three miles away at Millshaw, on the Leeds ring road.

The plant should be fully operational by autumn 1981 and after a further two years the number of jobs is forecast to rise to over 700.

Single market for services should be a priority

The creation of a single market for services should now be a high priority for the community, said Christopher Tugendhat, commissioner for financial institutions, in London on 28 June.

Outlining the commission's proposed directive on credit institutions at a *Financial Times* conference, Mr Tugendhat said that to avoid unnecessary and wasteful duplication of effort in supervision, the commission was promoting the principle of home country control so that as banks branched into other member states, home supervisory authorities would be able to follow them.

'This procedure will obviously require close co-operation among control authorities.'

Mr Tugendhat pointed out that main formal machinery proposed under the directive was the advisory committee of competent authorities, which involved national supervisory authorities, but whose members served not in their national capacity but as members of a European body. Their task would be to advise the commission on policy formulation, he said.

The greater monetary stability that the European monetary system should help to bring would provide a more favourable climate for increased cross-frontier investment which should bring in its train increased capital movements, he continued.

'Greater freedom of capital movement – and in this context I greatly welcome the recent liberalisation by the British government – must inevitably have certain consequences for those concerned with the prudential aspects of banking. It is vitally important that greater freedom should not result in less confidence', said the commissioner.

Conference on food and drink directive

European Study Conference is organising a conference on the requirements and implications of the latest EEC directive on food and drink labelling and advertising. It will be held at the Hyde Park Hotel, London, on Tuesday, 10 July.

Directive 79/112/EEC deals with the approximation of the laws of EEC member states about the labelling, presentation and advertising of foodstuffs.

Among the half-dozen speakers will be Dr. Egon Gaerner, of the European commission's foodstuffs division, who will explain the directive and its implications.

Further details are available from Barbara Lawson, European Study Conference, Kirby House, 31 High Street East, Uppingham, Rutland LE15 9PY, tel. 057-282 2711.

EEC consumer protection programme drawn up

A second draft action programme has been submitted to the council of ministers by the European Commission. This programme, aimed at protecting consumers and improving the availability of information for them, was discussed at two meetings of national experts from member states. The European parliament and the economic and social committee will in due course also be invited to submit their views.

The first action programme was adopted by the council of ministers in 1975. It set out five basic rights of the consumer – protection of health and safety, protection of economic interests, redress, information, and education, and representation. Action in several areas in the first programme has progressed slowly.

The second draft programme gives priority to the completion of some measures in the first, but also suggests a number of new initiatives, particularly in the areas of prices and price disparities in the community, and of the quality and cost of services.

Lomé convention renegotiated

Ministers from African, Caribbean and Pacific states (ACP) and EEC member states substantially agreed the text of a new Lomé convention on 27 June in Brussels, in a statement to the commons on 29 June, Douglas Hurd, Lord Privy Seal, who led the UK delegation at the talks, said that the text provides for improved access to the community for Commonwealth ACP exports of rum and beef. It also provides for increased community aid and European Investment Bank lending, special arrangements for ACP mineral producers, expanding the product coverage of the stabex scheme and new commitments on both sides for the promotion and protection of investment.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

Home news
Regulations changed for poultry meat 8

New publications
Development of agriculture in Germany and UK 11

Overseas trade news
Major opportunities for European construction industry 21

Exhibitions
First joint venture at Paritex 28

Country data 30

Export services 31

Government firm on fisheries conservation

Securing a fair and lasting settlement to the EEC's common fisheries policy was the government's clear wish, fisheries minister Alick Buchanan-Smith said at the opening of the international fisheries and marine equipment exhibition 'Euro-Catch 79' at Olympia on 27 June. The current commission proposals for the revised common fisheries policy were not acceptable, he said. If there is to be progress, new proposals will have to be put forward.

He affirmed that the UK is ready to play a constructive part, so long as other member states come forward in the same spirit, but a piecemeal settlement of issues which together might constitute a comprehensive common policy would not be satisfactory.

Recognising the crucial need to conserve stocks, Mr Buchanan-Smith said that a satisfactory settlement must include a comprehensive policy on conservation. There must also be an adequate zone of exclusive access for UK vessels and arrangements for preferential access as well, and not least, he said that the UK must obtain a very considerable share of the total allowable catches in the community.

Alick Buchanan-Smith: A crucial need to conserve fish stocks.

More EEC protection of groundwater against dangerous substances

The proposal for a directive on the protection of groundwater against pollution caused by certain dangerous substances was agreed by the council of ministers (environment), meeting in Luxembourg on 19 June. The directive will replace the interim provisions contained in article 4 of the Dangerous Substances Directive (76/464/EEC, usually known as ENV 131).

The aim of the new directive is to prevent the pollution of groundwater which may occur when certain substances are introduced into it either directly, or indirectly via the ground or subsoil. Families and groups of substances are specified in two lists: list I, the blacklist; and list II, the grey list.

Member states are required to prevent list I substances from being introduced into groundwater either directly or indirectly. Activities that may lead to indirect discharge of list I substances may be allowed provided all precautions are taken to prevent the introduction of the substances into groundwater.

In the case of list II substances, member states are required to limit discharge (direct or indirect) to avoid pollution. As with list I substances activities that may lead to discharge will require consent to ensure that the groundwater is not polluted.

The directive does not apply to discharges which contain only trace quantities of list I or II substances and discharges of domestic effluent from isolated dwellings. Provision is made for authorisation of discharges in connection with the reinjection into the same aquifer of water used for geothermal purposes, water pumped out of mines or quarries, or water pumped out for civil engineering works.

The requirements of the directive are compatible with current UK legislation and policy on groundwater pollution. The directive will come into force in four years, and will be applied by water authorities in the course of their normal consenting procedures.

At the same council meeting two other directives on water quality were agreed – the directive on the quality required for shellfish water and the directive on methods of measurement and analysis of surface water for abstraction and drinking.

Atmosphere pollution draft directive

An EEC draft health protection standards (HPS) directive sets limit values for smoke and sulphur-dioxide (SO_2) concentrations in the ambient atmosphere. As currently drafted, there are separate annual, winter and 24-hour values. The annual and winter values must never be exceeded. The 24-hour values must not be exceeded on more than seven days a year. The limit values for SO_2 are variable, depending on the concentration of smoke in the area concerned.

The draft directive was actively discussed in Brussels during the French presidency (first half of 1979), culminating in consideration by the council of ministers on 19 June. But no final agreement was reached (for example, the smoke 'trigger' value which determines whether the higher or lower daily SO_2 value applies is still undecided).

If the draft directive is adopted, the main means of implementing it in the UK would be by simply continuing with existing smoke control programmes – although it might be necessary to accelerate these in some areas to meet a directive deadline. It would also be necessary to introduce regulations limiting the sulphur content of fuel in certain central urban areas.

Tariff suspensions on fish imports

The council of ministers has agreed on temporary rates of import duties to apply to imports for processing of herring and certain white fish from 1 July to 31 December.

The existing total suspension of duty on fresh, chilled and frozen herring fillets will continue. The rate of duty on imports of herring dried, salted or in brine, in vinegar or spiced and salted has been fixed at 3 per cent. The duty on imports of cod, haddock and hake continues at the reduced rate of 9 per cent.

Tariff reductions will be reviewed in the autumn.

EEC indicative ceilings for imports from Efta

Information has been received that community imports of the following goods have reached 75 per cent or more of the indicative ceiling level for 1979 (see *Trade and Industry*, 2 March):

Order no.	Country of origin	CCT heading/Description
		48.15 B
IA6	Austria	Other paper and paperboard, cut to size or shape

In addition, community imports of the following goods have exceeded the indicative ceiling level for 1979.

Order no.	Country of origin	CCT heading/Description
		60.05
IP7	Portugal	Outer garments and other articles, knitted or crocheted, not elastic or rubberised
		48.15 B
IS12	Sweden	Other paper and paperboard, cut to size or shape
		ex 48.07 C
ISF11	Finland	Other coated printing or writing paper

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Divisions, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7174/482/408.

Common agricultural policy

The texts of the following regulations and decisions which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

Animal feedingstuffs. Regulation (EEC) 1144/79 amending article 14(3) of regulation (EEC) 1528/78 laying down detailed rules for the application of the system of aid for dried fodder (*Official Journal* L143, 12 June 1979).

Regulation (EEC) 1212/79 amending article 6 of regulation (EEC) 1418/78 adopting general rules in connection with the special measures for peas and field beans used in the feeding of animals (*Official Journal* L153, 21 June 1979).

Wine. Regulation (EEC) 1148/79 amending annex 1 of regulation (EEC) 217/79 in respect of the list of laboratories authorised to carry out analytical examinations in the wine growing sector (*Official Journal* L144, 13 June 1979).
Regulation (EEC) 1150/79 amending, as regards products of the wine sector, regulation (EEC) 1380/75 laying down detailed rules for the application of monetary compensatory amounts (*Official Journal* L144, 13 June 1979).

Fruit and vegetables. Regulation (EEC) 1152/79 amending article 1 of regulation (EEC) 687/79 laying down protective measures in respect of imports of dessert apples from countries in the southern hemisphere originating in Chile (*Official Journal* L144, 13 June 1979).
Regulation (EEC) 1208/79 supplementing annex 1 to regulation (EEC) 1035/72 on the common organisation of the market in fruit and vegetables, by the addition of leeks to the column headed 'vegetables' (*Official Journal* L153, 21 June 1979).

Processed fruit and vegetables. Regulation (EEC) 1171/79 amending regulation (EEC) 876/79 suspending the entry for home use within the community of cultivated mushrooms in brine originating in Taiwan (*Official Journal* L147, 15 June 1979).
Regulation (EEC) 1172/79 fixing for the 1979-80 marketing year the amount of production aid for tomato concentrates, peeled tomatoes, tomato juice, peaches in syrup and prunes and the minimum price to be paid to producers (*Official Journal* L147, 15 June 1979).

Animal health. Decision 79/542/EEC drawing up a list of third countries from which the member states authorise imports of bovine animals, swine and fresh meat (*Official Journal* L146, 14 June 1979).
Decision 79/543/EEC concerning animal health conditions and veterinary certification for imports of fresh meat from Spain (*Official Journal* L146, 14 June 1979).
Decision 79/544/EEC concerning animal health conditions and veterinary certification for imports of fresh meat from Chile (*Official Journal* L146, 14 June 1979).
Decision 79/559/EEC supplementing, by the addition of Spain, the list of third countries from which member states authorise imports of bovine animals, swine and fresh meat (*Official Journal* L147, 15 June 1979).
Decision 79/560/EEC supplementing, by the addition of Chile, the list of third countries from which member states authorise imports of bovine animals, swine and fresh meat (*Official Journal* L147, 15 June 1979).

Hops. Regulation (EEC) 1209/79 laying down, in respect of hops, the amount of aid to producers for the 1978 harvest (*Official Journal* L153, 21 June 1979).

Harmonisation of legislation

Agricultural and forestry tractors. The *Official Journal of the European Communities* L145, 13 June 1979, contains the texts of the following directives:
Directive 79/532/EEC on the approximation of the laws of the member states relating to the component type-approval of lighting and light-signalling devices on wheeled agricultural or forestry tractors.
Directive 79/533/EEC on the approximation of the laws of the member states relating to the coupling device and the reverse of wheeled agricultural or forestry tractors.

Further information on directive 79/532/EEC; Ministry of Transport, 2 Marsham Street, London SW1P 3EB, tel. 01-212 3434 ext. 3171; and directive 79/533/EEC, Ministry of Agriculture, Eagle House, 90-96 Cannon Street, London EC4N 6HT, tel. 01-623 4266 ext. 294.

Copies of the *Official Journal* L145 may be obtained from HMSO, price 60p plus postage.

Domestic appliances: energy consumption labelling. Two EEC council directives on the energy consumption labelling of domestic appliances have now been published in the *Official Journal of the European Communities* L145, 13 June 1979.

The first directive, 79/530/EEC, is a framework directive which sets out a harmonised form of community label to which any labelling scheme introduced by a member state must conform within two years. It is, however, left open for member states to decide whether or not to introduce labelling in their own territories. This framework directive is accompanied by directive 79/531/EEC, the first in a series of possible further implementing directives, which provides for the application of the labelling system to electric ovens.

Further information: Department of Energy, EC(A), Thames House South, Millbank, London SW1P 4QJ, tel. 01-211 6183.

Copies of the *Official Journal* L145 may be obtained from HMSO, price 60p plus postage.

Imports from non-member states

The *Official Journal of the European Communities* L153, 21 June 1979, contains the texts of the following decisions which authorise the relevant states to refuse entry to the specific goods. The decisions relate to varying periods; full details are set out in the relevant decisions.

Decision 79/561/EEC authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to men's and boys' woven suits (including co-ordinate suits consisting of two or three pieces, which are ordered, packed, consigned and normally sold together) of wool, of cotton or of man-made textile fibres, falling within heading ex 61.01 of the common customs tariff (Nimexe codes 61.01-51, 54, 57) (category 16), originating in Bulgaria and in free circulation in the other member states.
Decision 79/562/EEC authorising Germany not to apply community treatment to special gloves for sport, of leather, falling within heading ex 42.03 of the common customs tariff, originating in China and in free circulation in the other member states.
Decision 79/563/EEC authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to men's and boys' shirts, woven, of wool, of cotton or of man-made textile fibres, falling within heading ex 61.03 of the common customs tariff (Nimexe codes 61.03-11, 15, 19) (category 8), originating in Bulgaria and in free circulation in the other member states.
Decision 79/564/EEC authorising Ireland not to apply community treatment to blouses and shirt blouses, knitted or crocheted (not elastic or rubberised), or woven, for women, girls and infants, of wool, of cotton or of man-made textile fibres, falling within subheadings ex 60.05 AII and ex 61.02 B of the common customs tariff (Nimexe codes 60.05-22, 23, 24, 25; 61.02-78, 82, 84) (category 7), originating in Hong Kong and in free circulation in the other member states.
Decision 79/565/EEC authorising Ireland not to apply community treatment to shirts, T-shirts, lightweight fine knit roll, polo or turtle necked jumpers and pullovers, undervests and the like, knitted or crocheted, not elastic or rubberised, other than babies garments of cotton or synthetic textile fibres; T-shirts and lightweight fine knit roll, polo or turtle necked jumpers and pullovers of regenerated textile fibres, falling within heading ex 60.04 of the common customs tariff (Nimexe codes 60.04-01, 05, 13, 18, 28, 29, 30, 41, 50, 58) (category 4), originating in Hong Kong and in free circulation in the other member states.
Decision 79/566/EEC authorising Italy not to apply community treatment to shirts, T-shirts, lightweight fine knit roll, polo or turtle necked jumpers and pullovers, undervests and the like, knitted or crocheted, not elastic or rubberised, other than babies' garments, of cotton or synthetic textile fibres; T-shirts and lightweight fine knit roll, polo or turtle necked jumpers and pullovers of regenerated textile fibres, falling within heading ex 60.04 of the common customs tariff (Nimexe codes 60.04-01, 05, 13, 18, 28, 29, 30, 41, 50, 58) (category 4), originating in India and in free circulation in the other member states.
Decision 79/567/EEC authorising France not to apply community treatment to synthetic textile fibres: woven fabrics of synthetic fibres (discontinuous or waste) other than narrow woven fabrics, pile fabrics (including terry fabrics) and chenille fabrics, falling within subheading ex 56.07 A of the common customs tariff (Nimexe codes 56.07-01, 04, 05, 07, 08, 11, 13, 14, 16, 17, 18, 21, 23, 24, 26, 27, 28, 32, 33, 34, 36) (category 3), originating in Taiwan and in free circulation in the other member states.

EEC company law harmonisation programme: checklist

The following checklist gives a brief resume of the current position of EEC legislation or proposed legislation on company law. It is hoped to update this list at six monthly intervals. Further information tel. 01-215 5628.

Second directive (company capital)
The directive was formally adopted by the council of ministers on 13 December 1976. A consultative document on the proposed changes in UK company law was issued by the Department of Trade in July 1977 ('Implementation of the Second EEC Directive on Company Law') and a Companies Bill which seeks to implement the directive was introduced into the House of Lords in June 1979.

Third directive (internal mergers)
The directive was adopted in October 1978. Member states have three years in which to implement the directive and the Department of Trade will be consulting on its proposals for implementing the directive in due course.

Fourth directive (company accounts)
The directive was adopted in July 1978. It is expected that most companies in the UK will have to produce their accounts in conformity with the directive from 1982. The Department of Trade intends to publish a consultative document in the summer on its proposals to implement the directive in the UK.

Draft fifth directive (company structure and administration)
The EEC's commission's 'Green paper' on the board structure and employee participation issues (raised by the draft directive) was published in November 1975. The draft will be revised to take into account comments of the European assembly and the economic and social committee, and views expressed on the green paper.

Draft sixth directive (prospectuses issued when shares are quoted on stock exchange)
The fourth reading by a council of ministers working party has almost been completed. Discussion of the outstanding points will then take place in the committee of permanent representatives.

Draft seventh directive (group accounts)
A council working group started the first reading in September 1978. The second reading is expected to be completed shortly. It is possible that the working group might complete its work during 1980.

Draft eighth directive (qualification of auditors)
A draft directive was published in April 1978. The Department of Trade has consulted those interested and the directive is now awaiting discussion within a council working group.

Wurdinger report (proposal for a ninth draft directive on related companies and groups)
A draft directive is being prepared following a preliminary discussion by an EEC commission working group.

Pennington report (proposals for a draft directive on takeovers)
An EEC commissiom working party has considered Professor Pennington's report (which includes a draft directive) and is now drafting its own proposals. It is unlikely that this draft will be published in the near future.

Draft directive on the co-ordination of laws etc on collective investment undertakings for transferable securities (unit trusts)
A council working group began its first reading of the draft directive in September 1977. Adopting cannot be foreseen before 1981.

Co-ordination of laws governing the taking up of the activity of a stockbroker
A commission working group held one meeting in November 1978 to discuss a paper drawn up by the EEC commission. The discussion revealed little enthusiasm. The commission's further initiative is awaited.

Directive on admission of securities to official stock exchange quotation
The directive was formally approved in February 1979. Member states have two years in which to implement it.

Draft directive on divisions (scission)
Discussions on a draft directive arising from the third directive began in September 1978. The directive, which concerns the transfer of assets and liabilities from one company to a number of other companies, is unlikely to have much impact in the UK.

Draft directive on the annual accounts of credit institutions
A EEC commission working party began discussion, in November 1978, of a preliminary draft proposal for a directive drawn up by the EEC accountants study group in October 1977. It is expected that it will be some time before the draft of a directive is finalised.

European companies statute
A text revised in the light of the opinions of the assembly and of the economic and social committee, was presented by the EEC commission to the council in May 1975. An ad hoc working group considered the political implications of the Statute and has reported its findings to the committee of permanent representatives. The council working group has now started the first reading. Progress during 1979 has been slow.

European co-operation grouping
The EEC commission published an amended draft regulation in April 1978, following the receipt of the opinions of the European assembly and the economic and social committee. No dates for discussion have been arranged yet.

Draft convention on international mergers
The second reading is expected to be completed in September 1979.

Draft bankruptcy convention
Negotiations at expert level based on the observations submitted by the three new member states are now completed and a new text is expected to be issued in July 1979. A final reading of this text is scheduled for September after which it will be referred to the respective member state governments for approval.

European patent convention, community patent convention, and patent co-operation treaty
The European patent convention came into force on 7 October 1977; so far 10 states have ratified it. The European Patent office opened for the filing of applications on 1 June 1978. The community patent convention is likely to come into force in 1982–83. Three working parties have been set up to prepare for it.

The patent co-operation treaty is another worldwide patent treaty, but of more limited scope than the other two measures, which came into force on 24 January 1978, with 1 June 1978 being the date from which applications could be filed.

Insider dealing
The EEC commission held a preliminary working party meeting in 1976. A further meeting may be held in 1979.

Canvassing of securities
The EEC commission has produced a draft directive which has been discussed in a working group. The draft has not aroused great enthusiasm. The commission's further proposals are awaited.

Continuing disclosure of information concerning securities admitted to listing on a stock exchange
The EEC commission had submitted a draft directive to the council of ministers, which is being considered by the European assembly and the economic and social committee. The Department of Trade is consulting interested parties on the draft in readiness for discussion within a council working group.

Dissolution and liquidation of limited companies
Preliminary discussion of the Scholten report (which contains a draft directive on the subject) began in November 1977. The discussions continued, completing the first reading. A revised draft will be prepared before the second reading starts.

Convention of the mutual recognition of companies firms and legal persons
A draft convention was prepared and ratified by the original six member states in 1968. The object of the convention is to secure for companies and other forms of business associations formed under the laws of one member state recognition in other member states. An ad hoc working party has recently been convened to discuss the adjustment of the convention in view of the accession to the EEC of the three new member states.

Overseas trade news

Major opportunities for European construction industry

Despite a big challenge from Japan and the newly industrialised developing countries there are still major opportunities open to the European construction industry if it makes the most of its technical skills and resources.

Trade minister Cecil Parkinson told the Euro-Construct conference organised by the National Economic Development Office in London on 29 June that the UK industry might consider whether its different branches should follow the lead of other countries and adopt a more co-ordinated approach to their overseas marketing.

Relative to their counterparts in some countries, he said sometimes they seemed to go their own separate ways so that the UK package was not put together as effectively as it might be.

UK industry could respond to the challenge from its new competitors by building on its technical and managerial strengths and raising the overall level of its performance, Mr Parkinson suggested. European firms could join forces in third markets where it was mutually advantageous for them to do so, and companies could collaborate directly with their Japanese, Korean and other competitors through joint ventures in third markets and through selling them the plant, equipment and technical expertise they required.

Between 1972 and 1977, the value of new contracts won by Japanese firms increased by some 700 per cent Mr Parkinson explained. Korea and some other advanced developing countries had made their presence felt in the last two or three years. They were in direct competition with European firms for third country business, notably in the Middle East, and, with the Japanese, represented a competition that the European industry could not afford to under-estimate.

Mr Parkinson pointed out that technical expertise was the European industry's trump card. However, continued investment in building research, the improvement of construction methods and the development of new materials, plant and equipment were essential if the industry was to keep ahead of the competition and keep down its costs, he went on.

As for performance, it was important to appreciate the importance in today's markets of being able to work to strict conditions of contract and of examining the package offered – design, construction, training, finance – to ensure that it represented the best possible package.

Mr Parkinson indicated that he would like to see development of the trend of European firms joining forces where it was mutually advantageous. To help UK firms find European joint venture partners, British embassies in several European countries were drawing up registers of those local companies which were interested in the possibility of collaboration in third markets, he explained.

'The Japanese and the Koreans were definitely interested in tapping the technical expertise of UK and other European firms through joint ventures in third markets, he said.

Competition in the projects market was fierce and likely to get fiercer, particularly now there were signs that the pace of development in the Middle East and elsewhere might be slowing down. 'But there are still major opportunities open to the European industry if it makes the most of its technical skills and resources'.

Have you a good export picture?

Each week *Trade and Industry* publishes pictures illustrating Britain's export business. Companies with export successes are invited to send in the story with a photograph showing the goods in manufacture, ready for despatch, or, preferably, on arrival overseas. The story must, of course, reach us while it is still news.

Send your export photographs to the Editor, *Trade and Industry*, Eleventh Floor, Millbank Tower, Millbank, London SW1P 4QU.

Get the export message down the line – Parkinson

A call for greater shopfloor involvement in exports was made by trade minister Cecil Parkinson at an Export United conference in London on 28 June.

Mr Parkinson told over 100 top businessmen at the conference that government, management and workforce should all be pushing from the same side to boost exports, but it was up to management to 'get the message down the line'.

Delegates heard how Export United campaigns in Vickers, Thorn Electrical Industries, Reckitt and Colman and Smiths Industries were helping the industrial relations climate of the companies and of the importance those companies placed on good internal communications.

Explaining the aims of the campaign, the Duke of Kent, vice-chairman of the British Overseas Trade Board and a patron of Export United, said the campaign provided firms with a framework – an idea – within which they could set up systems, appropropriate to their needs, for making sure that everyone in the firm understood how his own welfare, his job prospects, the strength of the firm and, eventually, the prosperity of the country depended on satisfying overseas customers. 'The message is, therefore, one of involving individuals.'

Arrangements for licensing exports of non-alloy ferrous scrap to countries outside the European community

The government is reviewing the future of export controls on ferrous scrap. In the interim, the current arrangements will be extended to the third quarter of 1979.

From 1 July, exports of ferrous scrap to third countries will again be limited to 60 000 tonnes per month, of which 3000 tonnes per month will be available for exports of high grade scrap.

The arrangements are as follows:

Low-grade and fragmentised scrap

Applications for licences to export low-grade and fragmentised scrap will be considered from all exporters providing evidence of firm orders. The following types are treated as low-grade or fragmentised scrap:

- ☐ Compressed baled material, other than compressed unused sheet and sheet cuttings.
- ☐ Loose used wrought material containing 90 per cent or more, by weight, of a material of a thickness not exceeding 3 mm.
- ☐ Turnings and borings.
- ☐ Fragmentised used wrought material.

If individual licence applications for low-grade and fragmentised scrap appear excessive when compared to previous applications, it may be necessary to issue a licence for a lower quantity and to require evidence of usage before a further licence is issued.

High-grade scrap

High-grade scrap covers all other non-alloy ferrous scrap and will be allocated to merchants on the following basis:

First, licences will be allocated in proportion to applicants' total exports of all grades of scrap both to community and third countries during a base period from 1 April, 1978 to 31 March 1979. Licences will be issued for the complete quarter beginning 1 July.

Secondly, there will be a qualifying minimum export performance of 70 000 tonnes. Export performance below this tonnage during the base period will be insufficient to qualify an exporter for consideration for a licence.

Thirdly in order to qualify for licences applicants will need to provide documentary evidence of firm orders.

Licences for high-grade ferrous scrap will be

available to individual traders for amounts of 500 tonnes or more only. Licences will normally be valid for two months.

Traders whose exports to all destinations against their own orders in the base period totalled 70 000 tonnes or more and who wish to be considered for an allocation under the quota for high-grade scrap exports for the period beginning 1 July were invited to submit not later than 4 July particulars of the total tonnage of exports of non-alloy ferrous scrap in each month of the base period of 12 months ended 31 March 1979 in the following form:

	To community countries	*To other countries*
a Exports against own orders		
b Exports against orders obtained by others		

This information should have been forwarded to the Department of Industry, Iron and Steel Division, Ashdown House (Room 821), 123 Victoria Street, London SW1E 6RB. Although, most traders will have been notified directly. about these arrangements, any trader wishing to apply after the 4 July deadline should telephone the department on 01-212 6731.

When this information has been received, individual allocations in respect of the whole of the quarter beginning 1 July will be determined. Applicants will be informed whether or not they have been granted an allocation. Although all the information supplied will be considered carefully, it should not be assumed that all exporters will necessarily be allocated a share of the quota.

Export licences will not be issued until traders have submitted to the Department of Trade, Export Licensing Branch supporting documentary evidence (in English) of firm orders to sell to a buyer in a non-community country (subject to availability of UK export licence) stipulated tonnages of high-grade, non-alloy ferrous scrap. Telex messages giving full details will be accepted but must be followed, not more than two weeks after, by the written confirmation of the overseas buyer.

Licences, which will be valid for a period of not more than two months, will then be issued as appropriate against allocations. Further evidence of firm orders supplied by an applicant after the initial submission of such information will be taken into account until the allocation is exhausted.

Trade inquiries should be addressed to the Department of Trade, Export Licensing Branch, Sanctuary Buildings, Great Smith Street, London SW1P 3DB.

'Hints to exporters' booklets issued

Revised editions of the 'Hints to exporters' booklets on Costa Rica; on Senegal, Mauritania, Mali, Guinea, Guinea-Bissau and Cape Verde; on Fiji; and on Norway have been issued.

British exporters can order these booklets by post, accompained by the remittance, from the Department of Trade, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU, at £1 per copy, plus postage and packing as follows: one copy 20p; two to four copies 30p; five to seven copies 40p; more than seven post free.

Copies may also be purchased by personal callers at Export House and at the offices of the Department of Industry at Newcastle upon Tyne, Cockermouth, Manchester, Leeds, Nottingham, Birmingham, Bristol; from the Scottish and Welsh Offices, and from the Department of Commerce, Belfast.

Visit by commercial officer from Australia

Mr J. M. Pepper, vice consul commercial in Adelaide, is expected in this country in October 1979 when he will be available for discussions on capital goods. The post in Adelaide looks after the Northern Territory and Broken Hill as well as south Australia.

British firms and organisations who wish to meet this officer are asked to write for an appointment giving full details of the specific export problem and commodities involved as follows: firms in Northern Ireland should contact the Export Branch of the Department of Commerce, Belfast, those in Wales the Welsh Office, Cardiff, and in Scotland the Scottish Office, Glasgow.

Firms in London, the eastern and south-eastern regions should write to Tours Section, Department of Trade, 50 Ludgate Hill, London EC4M 7HU.

For all other regions, firms should contact the appropriate Department of Industry regional office (exports) for their area. It must be pointed out that commercial officers have only a limited time at their disposal and it may not be possible to fit everyone in. Very often the above offices can supply the information expected to be obtained at an interview.

Requests for an interview with Mr Pepper should be submitted by 10 August.

Potteries film will promote British exports

The British Tourist Authority film 'Josiah Wedgwood and the English potteries' is expected to have a worldwide audience of 300 million during the next five years. The film won the *Financial Times* export award and the silver award in the public relations and prestige category at the 1979 British industrial and sponsored film festival. The British awards join those collected at the United States industrial film festival and the Chicago international film festival. The *Financial Times* export award is presented annually by the newspaper to the film which is considered most likely to succeed in the promotion of exports. Made by Collier Marsland Films of London, this Wedgwood 20-minute film tells of the great influence the company's founder, Josiah I, had on the growth of the eighteenth century English pottery industry.

United Kingdom and USSR to talk tax

Exploratory talks are due to be held in Moscow during the week beginning 1 October on the possibility of concluding a comprehensive double taxation convention between the United Kingdom and the Soviet Union.

The Inland Revenue is inviting representations and these should be addressed to the Inland Revenue, Policy Division 5 (International), Room T3, West Wing, Somerset House, London WC2R 1LB, to arrive not later than 1 September.

Agreement with Sri Lanka

A double taxation convention between the United Kingdom and Sri Lanka was signed in London on 21 June.

The convention is subject to approval by the House of Commons and the text will be published in due course as a schedule to a draft order in council.

Relief booklet revised

Inland Revenue leaflet IR 6 'Double taxation relief' has been revised to take account of the changes in the rules relating to double taxation relief including the introduction of the imputation system of taxation and the renegotiation of a number of the UK's double taxation agreements since the previous version of the booklet was published in 1969.

Copies of the booklet are obtainable, free of charge, from the offices of Inspectors of Taxes and from PAYE inquiry offices.

London chamber plans middle east events

As a follow-up to the business forum in the spring of 1978 on the legal and practical aspects of agency problems, the middle east and north Africa section of the London Chamber of Commerce and Industry is organising a day conference in September on doing business in the Gulf states and Saudi Arabia.

The panel of speakers, many of them resident in the countries concerned, will include Mr W. Ballantyne, barrister, consultant on middle east law, who will deal with legal trends and developments in the Gulf states and Saudi Arabia; Walid Chorbachi, partner, Ernst and Whinney, a Khobar, Saudi Arabia, who will speak on practical business problems in Saudi Arabia; Ismail Amin, partner, Ernst and Whinney, Bahrain, and Derek Fletcher, partner, Ernst and Whinney, United Arab Emirates, who will deal with practical business problems in the Gulf states; and Graham Du May, managing director, G. F. Du May and Company, who will speak on the role of the export house.

The conference – to be held on 26 September – will be chaired by Mr M. R. Meakin, director, Anthony Gibbs (Middle East) Ltd, and there will be an opportunity for panel discussion.

Business in Saudi Arabia

On 25 July, John Gray, counsellor commercial at the British embassy in Jeddah, will visit the London chamber to speak about business in Saudi Arabia. Mr Gray's talk is expected to be of particular interest to those engaged in the construction supply industry, telecommunications, desalination, airport and port equipment, power distribution transmission, security equipment, foodstuffs, leisure and sports clothing, hospital and school supplies.

The meeting, which will allow for questions from the floor, will be followed by a reception.

For further information about both events contact Mr M. F. Petheram at the London chamber, tel. 01-248 4444 ext. 38.

Machester chamber considers India tour

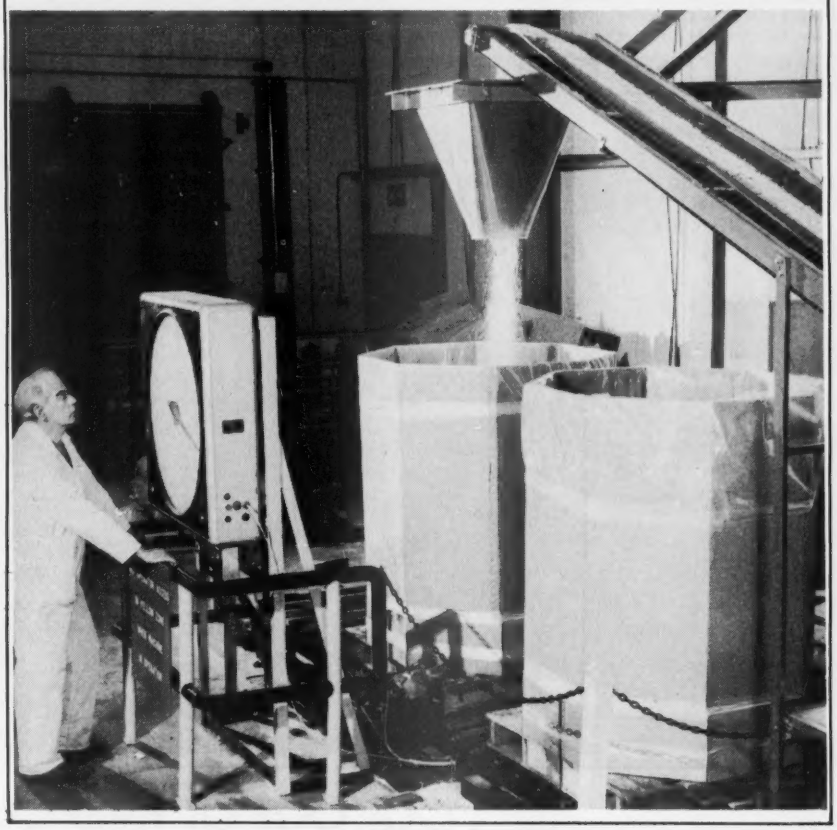
Manchester Chamber of Commerce is considering sending a trade mission to India from 14 to 28 October.

The chamber says that in the past two years the Indian market has created increasing opportunities for British exporters in various sectors, and the prospects are very good for the future. The sectors in which there are good prospects include instrumentation, leather working machinery, garment manufacturing machinery, mineral exploitation and basic drugs.

Mr Dennis Arrandale, the chamber's assistant director, says that the object of the mission would be to visit two or three of the main industrial and commercial centres, with a provision for a certain level of flexibility to other areas of interest to mission members.

Interbulk containers for Fibreglass exports

Fibreglass Ltd, at its Wrexham plant, now packs a proportion of the fibreglass reinforcements materials for export to Holland in Interbulk intermediate bulk containers supplied by Bowater Containers Ltd. The containers in the photograph are being filled on a special vibratory weight scale to allow for better bulk density.



Dundee mission to Singapore and Malaysia

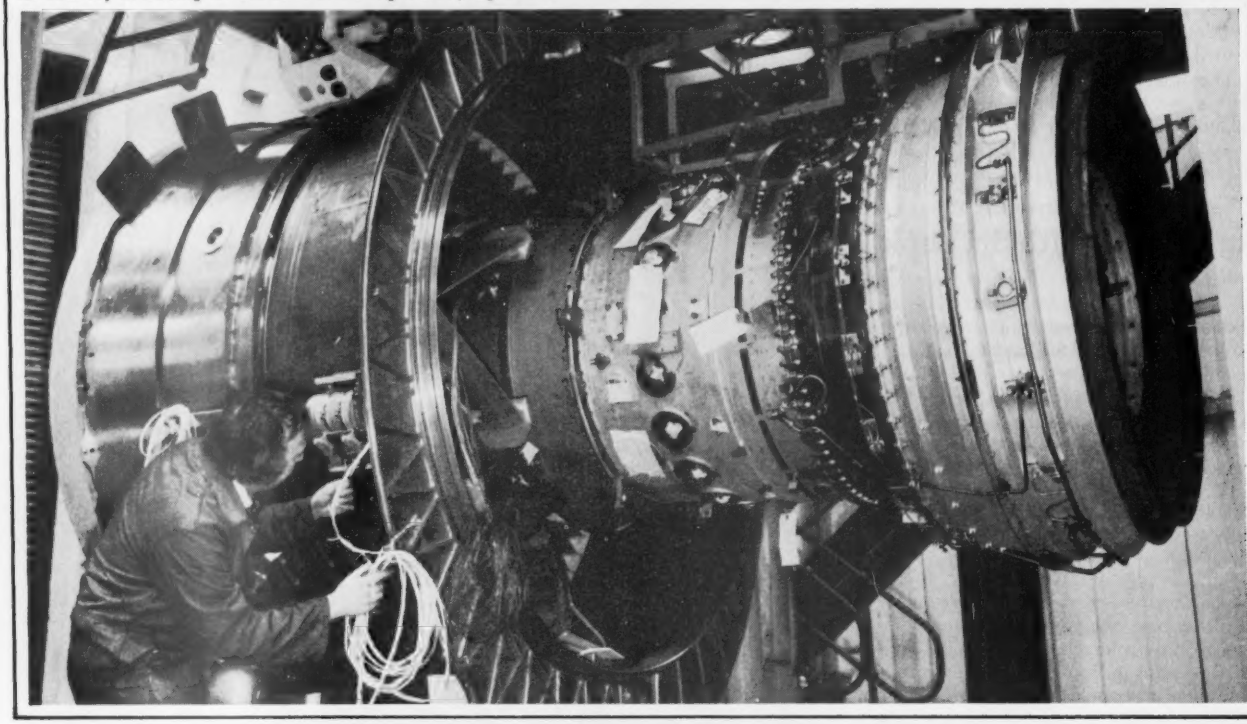
Next February Dundee and Tayside Chamber of Commerce and Industry is sponsoring its fifth trade mission to Singapore and Malaysia in five years. The dates – 23 February to 8 March – have been selected to coincide with the offshore south-east Asia conference and exhibition (the Asian petroleum show) which will be held in the Hyatt Convention Centre, Singapore, between 26 and 29 February.

The mission is supported by the British Overseas Trade Board and each approved participant will qualify for a contribution of £435 towards travel costs. Participants will be able to visit other countries either before or after the mission period, but the number of places available will be limited.

Further details may be obtained from Miss Avril Novak, Dundee and Tayside Chamber of

Successful test for Rolls-Royce export engine

The first Rolls-Royce RB 211-535C development engine, seen here in final stages of construction, has made a successful test run. The new engine will be launched in the twin-jet Boeing 757 airliner in 1983. The engine is expected to allow the aircraft to use up to 40 per cent less fuel per passenger mile than the current Boeing 727. Decision to build the engine was taken only eight months ago and, in addition to the successful test, work is well advanced on the remaining 10 development engines. Certification is due before mid-1981 when production engines are scheduled for delivery to Boeing for the start of the flight test programme.



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Frankfurt International Fair
August 26th– 29th 1979

Fair admission tickets (advance sale at reduced rates) information and travel tips are available from:
Collins & Endres, 36, Sackville Street, London WIX 1DB,
Telephone: 01-734 0543. Telex: LOP G Ldn 262236

Commerce and Industry, Chamber of Commerce Buildings, Panmure Street, Dundee DD1 1ED, tel. (0382) 22122.

Yorkshire mission to visit south-east Asia in September

A 14-strong mission from west Yorkshire will be arriving in Hong Kong on 8 September to start a mission that will cover, besides Hong Kong, Singapore and Malaysia. The mission is being sponsored by the British Overseas Trade Board and also supported by the West Yorkshire Metropolitan County Council.

Organised by the Leeds Chamber of Commerce and Industry for the west Yorkshire group of chambers the itinerary is identical to that of the mission mounted by Leeds chamber in September 1977.

The mission will be led by Roger F. Fendley, managing director of RFF Engineering (International), who successfully set up distribution arrangements for the company's power steering equipment when he accompanied the 1977 mission and during a subsequent independent visit in April 1978.

ECGD statutory return: commitments under the Export Guarantees and Overseas Investment Act 1978

The Export Credits Guarantee Department (ECGD) operates under the Export Guarantees and Overseas Investment Act 1978. Commitments under the act as at 31 March 1979 are listed below.

Export guarantees

New guarantees given and liabilities incurred in quarter ended 31 March 1979

The aggregate amount of new guarantees given under the act involving sterling liabilities amounted to £640 million under section 1, £411 million under section 2(1) and the aggregate amount of new liabilities incurred under section 5 of the act was £6 million: a total of £1,057 million.

The aggregate amount of new guarantees involving foreign currency liabilities amounted to: SDR 1,230 million under section 1 and SDR 27 million under section 2(1); a total of SDR 1,257 million.

These represent ECGD's maximun liabilities under new guarantees given during the quarter. The continuing liability under guarantees given prior to the quarter is not reflected here, but is covered in the liabilities totals below.

Amount recorded against ECGD's statutory limits as at 31 March 1979

Total outstanding sums recorded against the sterling limit of £25,000 million under section 6 of the act amounted to £20,119 million.

The following items are taken into account:

1 Liabilities in respect of guarantees under section 1 – £12,701 million.
2 Liabilities in respect of guarantees under section 2(1) – £5,502 million.
3 Amount of principal monies due under arrangements made under section 2(2) – Nil.
4 Amount of principal monies outstanding in respect of loans made under section 3(1) – £2,011 million.
5 Sums paid in respect of securities acquired and for the time being held under section 4 – £136 million.
6 Liabilities in respect of arrangements made under section 5 – £79 million.

The aggregate of 1 to 6 above will exceed the total liability to the extent that guarantees to banks have been given under a different section from the related credit insurance guarantees.

Total outstanding sums recorded against the SDR limit of 10 000 million SDR under section 6 amounted, after revaluation, to SDR 4107 million.

The following items are taken into account:

1 Liabilities in respect of guarantees under section 1 – SDR 1,678 million.
2 Liabilities in respect of guarantees under section 2(1) – SDR 2,429 million.
3 Amount of principal monies due under arragements made under section 2(2) – Nil.
4 Amount of principal monies outstanding in respect of loans made under section 3(1) – Nil.

Investment insurance

Liabilities assumed in quarter ended 31 March 1979

During the quarter the aggregate amount of new liabilities assumed under section 11 of the act was £3.6 million.

Amounts recorded against ECGD's statutory limit as at 31 March 1979

Total outstanding sums recorded against the limit of £250 million under section 11(5) of the act amounted to £84 million.

Notes

Gurantees are given under section 1 after consultation with the Export Guarantees Advisory Council. Guarantees under section 2(1) are those given in the national interest.

Section 2(2) enables ECGD to provide financial facilities, eg to make loans to match foreign competition on unusual credit terms and to enter into foreign currency loans should the need arise.

Section 3(1) is used to refinance banks which make sterling finance available on special fixed interest rates for exports sold on credit terms of two years or more.

Section 4 enables ECGD to acquire, hold and dispose of securities. This was used to provide aid loans before this function was transferred in 1964 to the then Ministry of Overseas Development.

Section 5 enables ECGD to give cost escalation cover.

Section 11 enables ECGD to insure new UK investment overseas against certain non-commercial risks.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1745: revised 1979 arrangements for certain imports from Czechoslovakia, GDR and Romania

Notice to importers 1718 (*Trade and Industry*, 5 January 1979) set out the 1979 quota arrangements for imports from the state trading area, including Czechoslovakia, the German Democratic Republic and Romania. Following clearance through the appropriate European community channel machinery certain quotas have been revised and are now as set out below:

Imports from Czechoslovakia

Quota no./CCT heading no./Description		Value £1,000 cif
R5/65.01, 65.03, 65.05, 65.06 Headgear (of which not more than £123,645 for hats and hoods of wool or fur felt)		183.9
Category no.	Units	Quota
35	Tonnes	24
36	Tonnes	60
38 A	Tonnes	Nil
62	Tonnes	31
62 (IL) [1]	Of which, not more than Tonnes	5

[1] Of lace of BTN heading 58.09 B. IL Inner limit.

Imports from German Democratic Republic

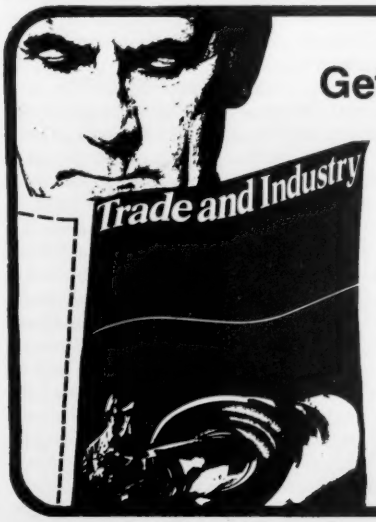
Category no.	Units	Quota
13	Pieces	12 000
17	Pieces	27 500
25	Pieces	12 500
70	Pairs	300 000

Imports from Romania

Quota no./CCT heading no./Description	Quantity
R9/ex 85.15 Transistorised radio and television broadcast receivers and radiograms	7 000 units [1]

[1] Quota previously set out in value.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 280.



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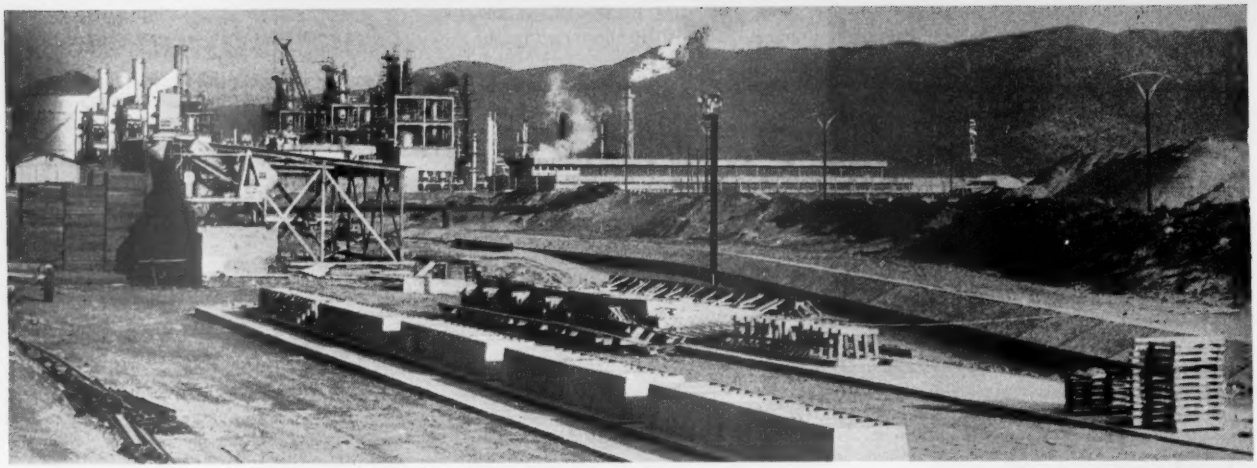


MARKET REPORT: ALGERIA

Where absence makes the heart grow fonder

Seventeen years after Algerian independence, the first reaction of a good many British businessmen to the largest north African market is 'surely the French have got that market buttoned up?' But as this report explains, competition is hotting up and the Algerians are keen to give British exporters a fair crack of the whip.

France remains Algeria's number one supplier but the competition is moving in fast. West Germany in particular, but also Italy, the United States, Japan, Spain and Belgium, are building up their position with the active encouragement of the Algerians, whose watchword has long been 'diversification'. Britain, however, has not taken full advantage of this attitude; last year (on provisional figures), Britain was only Algeria's eighth supplier with about 3.25 per cent of the market. This was an improvement on the year before when the UK market share was 2.5 per cent, and exports have risen by some 20 per cent, to £120 million. But the opportunities for doing more business are there. Perhaps it is the unfamiliarity of the Algerian market that holds back some British businessmen.

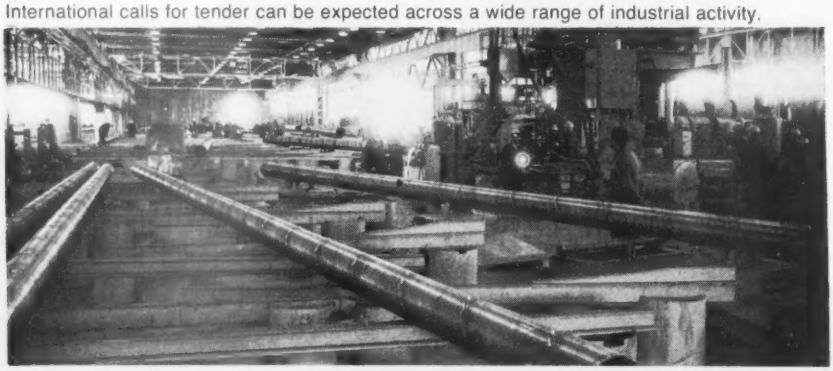
A planned economy

Last December, President Boumedienne died unexpectedly at the early age of 46. He had led the country virtually since its independence and Algeria's political maturity was put to a sudden test in finding a successor who could ensure that his work was continued without hiatus. It was a test which Algeria passed with flying colours. Within a matter of months, the new president, Benchedid Chadli, had been elected, the government re-shuffled and assurances given that the country's economic policies would continue largely unchanged.

But what are these policies? Already, before achieving independence, Algeria had chosen the 'socialist option'. Since then, it has developed its economy by means of a number of plans. The second development plan ended at the end of 1977 and the third plan is soon to start. From what President Chadli said to an assembly of provincial governors at the end of April, it is clear that the plan will give priority to the urgent needs of the people – water, health, and housing. Overall it will doubtless have few surprises, but will offer export opportunities in agriculture/irrigation, housing and related infrastructure such as sewage schemes and transport.

It is generally accepted that agriculture has not been a success story so far. Problems of organisation and motivation aside, the country has wasted a lot of its limited water supply. And as a result, Algeria continues to spend an unnecessarily high proportion of foreign exchange earnings on agricultural imports to feed a population with one of the highest growth rates in the world. The government is now determined to tackle the problem through two ministries – agriculture and water – and strong ministers have been appointed, even before the new plan has emerged. More international calls for tender can be expected across the whole range of agricultural and hydraulic activity – for example cattle breeding, animal feeding, food processing, agricultural machinery, dam building, and irrigation projects. Following up its successful general visit last year, the London Chamber of Commerce and Industry sent a specialist mission in hydraulics to Algeria this spring, which has resulted in a particularly good understanding of Algeria's intentions in this field, as well as access to the decision makers.

International calls for tender can be expected across a wide range of industrial activity.



Housing

The Ministry of Town Planning, Housing and Construction, as it was renamed a few months ago, is fully aware of the enormous back-log resulting from previous under-investment in the housing sector. A crash programme is already in hand which does not depend on the third plan coming into effect. The 1976 national charter sets an annual target of constructing 100 000 units per annum from 1980. But the minister has recently raised his sights, declaring at one point that Algeria must build 1.5 million units between now and 1990 ('a second Algeria') and at another predicting construction at the even higher rate of 200 000 units per annum from now to 1990. Foreign co-operation is sought. Opportunities for selling the mechanical equipment, heating installations, light fittings, and the sanitary ceramics needed for this vast programme will be increased. But over and above this, the Algerians are seeking foreign partners for a joint venture with an Algerian state enterprise to build an agreed number of houses, or a hospital or a university.

Since independence, Algeria's economy has

been based on a wish to maximise the revenue from hydrocarbons (from oil at the start, but now increasingly from gas) and to use this revenue to industrialise. The Algerians know that the day will come, perhaps in the early part of the twenty-first century, when these hydrocarbons run out. Algeria's gas programme, particularly the construction of plants to liquefy the gas, has been running behind schedule and hoped-for contracts with the United States have not all materialised. But the programme is on course and contracts have been signed with European customers for amounts which ensure Algeria an alternative market. The prospect moreover is of gas prices rising relative to those of oil. It has been estimated that if hydrocarbon exports grow as planned, it should be possible to manage the economy over the next four years, to bring about an economic growth of about 8 per cent per annum.

Austerity economy

In accordance with this policy, Algeria has borrowed, and is borrowing, up to the hilt. But the international financial world has maintained its confidence in the country. Algeria runs an austerity economy with a high domestic savings rate and little squandering on unnecessary imports or luxury consumption. It was noticeable that during the months when the president lay dying and nobody knew what kind of regime would follow, it continued to borrow at the same high rate as before.

Only the future will show whether and when Algeria's revenue from oil and gas will bring the country to take-off point. Its enormously high population growth rate (at least 32 per 1000) and its failure to feed even the present population, with a resulting heavy drain on foreign exchange, are two main factors on the negative side. But Algeria has made an impressive start on industrialisation throughout the country and even in towns well to the south of the heavily populated coastal strip. Understandably the country has been called one large workshop.

Doing business

The delay in the Third Development Plan should not hold up routine business: only some of the largest purchases and projects may have to wait for the green light. To make room for the priorities, it may be that less emphasis will be placed on heavy industry as against light industry which will produce more consumer goods and meet people's rising expectations. But the ways of doing business are not going to change: the government has expressly dampened the aspirations of those who were hoping for 'liberalisation' in any sense of a move away from the socialist option.

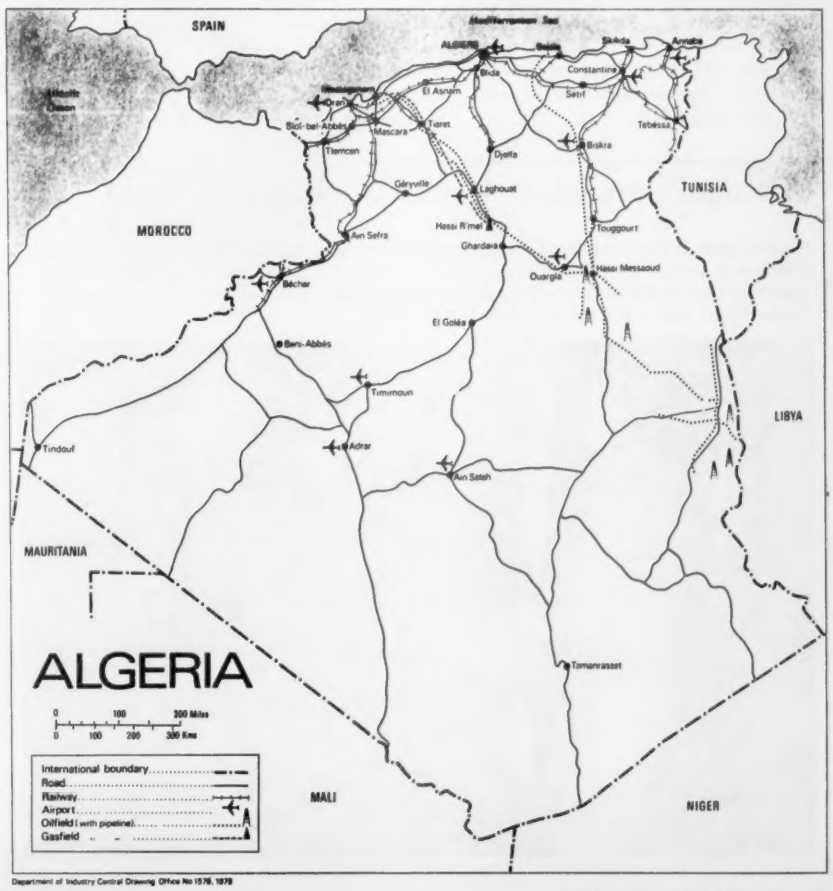
To be practical, the first thing that the socialist option means to the foreign businessman is that there are no agents in Algeria and a new law, passed in February 1978, giving the state a monopoly of external trade, forbids (among other things) Algerians to engage privately in the import or export business. This makes it a difficult market to penetrate. Algerian state enterprises are usually obliged to go out to international tender for their larger imports. The calls for tender appear in the local French language press, with a proportion of them also appearing in international newspapers such as the *Financial Times*, *Le Monde* and, *La Stampa*. The bids have a closing date, which is usually tight but can sometimes be extended. A jury then adjudicates on the bids received. The British embassy reports a call for tender by telex within two or three days to the Export Intelligence Service of the BOTB and then immediately sends the relevant tender documents. Last year it sent something like 700 telexes of this kind. If the firm has followed the quoted requirements exactly, it is then likely to be called to Algiers for further discussions and negotiations. If a firm does not swiftly respond to such a call, it will almost certainly have lost the business. It goes without saying that financial conditions are among the most important and here the exporter will find the Algerians knowledgeable and demanding. Believing in the new international economic order, they will also be keen on incorporating, where appropriate, a strong training element designed to further the transfer of technology from the developed to the developing world.

All business in Algeria must be done in French. Arabic has been declared the national language, but it is not yet, by a long way, the business language. Algeria's policy of diversifying away from France has thus given great advantage to the other francophone countries, Belgium, Switzerland, Canada. But language cannot be an excuse for staying away: West Germany and Japan, a country which only a few years ago was nowhere in this market, are overcoming the problem. We must not raise false hopes, but in certain sectors, noticeably oil and gas, more and more Algerians are speaking English. There must be nearly 2000 studying in England at any one time and the students literally queue at the British Council offices in Algeria to register for classes.

Further information

Further information on trade with Algeria can be obtained from Commercial Relations and Export Division, Department of Trade, 1 Victoria Street, London SW1H 0ET, tel.01-215 5358; or from Commercial department, British embassy, Résidence Cassiopée, Bâtiment B, 7 Chemin des Glycines, Algiers.

An Opec country of 18 million people, Algeria is quite the biggest market in north Africa. But it is a difficult one. The Algerians are unsentimental negotiators – they do not always answer telexes by return and, sometimes, not at all. They have been also known to keep people waiting for their money although it usually comes in the end. But it has a political and economic stability which compares well with that of other countries in the region as its Export Credits Guarantee Department rating reflects. West Germany sells five and a half times what Britain sells, Italy three and a half times, Japan nearly three times, the United States twice as much. The Algerians not only trade overwhelmingly with the west (only 2 per cent of imports come from the Soviet Union) but is anxious to give Britain a fair crack of the whip. Only two and a half hours by air from Algiers, with eight flights a week, and with the advantage of direct dialling, Britain is the western partner whose relative absence from the market Algerian officials in central government and in the state enterprises never cease to regret. The Algerians call on British businessmen to be more aggressive; it is a challenge worth being ready to meet.



Department of Industry Central Drawing Office No 1578, 1978

Overseas trade exhibitions

Adventurous British in Toronto

From George Finlayson, British consulate-general, Toronto

Enterprising representatives of British companies in Toronto recently staged a group presentation of quality British products in one of Toronto's new office buildings, First Canadian Place. The exhibition, held from 24 May to 3 June, was designed to illustrate British inventiveness and technical skills and was aimed at the executives of many of Canada's leading companies who work in the building.

From the excitement of motor sports, ocean racing and cycling to mountain climbing and exploring, a display of photographs and some of the finest of British craftsmanship was displayed throughout the lofty luxury of the new building.

Organised jointly by First Canadian Place and the British consulate-general, the exhibits included Rolls-Royce, Jaguar, Aston Martin and TVR cars; Topper and Seagull sailboats, inflatable boats and dinghies; a motor bike and a racing bicycle.

A background of magnificent montages of near life-size colour photographs (provided by Britain's Central Office of Information) of actual on-the-spot scenes of such adventures as Operation Drake, round-the-world sailing, the Darien Gap expedition, north and south pole surveying.

The Adventurous British kick-off. Left to right: Tim Severin, author of the participant in 'The Brendan voyage'; Geoff Fedrick, acting British consul-general, Toronto; Colin Franks captain of Toronto Blizzard NASL soccer team; and S. Fordsham of First Canadian Place.

The exhibition was opened by the acting British consul-general, Mr G. C. Fedrick, and 'kicked off' by soccer star Colin Franks, captain of Toronto Blizzard and formerly with Sheffield United.

Thousands of businessmen pass through First Canadian Place in the heart of Toronto's financial district each day. Exhibitors expressed great satisfaction with the show, which resulted in many inquiries and several sales.

Portugal's president visits UK's joint venture

Britain's charge d'affaires, Mr M. I. Goulding, welcoming Portugal's President Eanes to the British joint venture at the twentieth Lisbon international fair on 7 June. The joint venture, sponsored by the Birmingham Engineering and Building Centre and the British Overseas Trade Board, was made up of 10 British companies.

First joint venture at Paritex wins orders

From Helen Taylor, British embassy, Paris

Britain had its first joint venture at this year's wallpaper, textiles and coverings exhibition, Paritex, held in Paris from 7 to 11 June, and the British companies present, under the sponsorship of the Wallcoverings Manufacturers' Association of Great Britain, did extremely well.

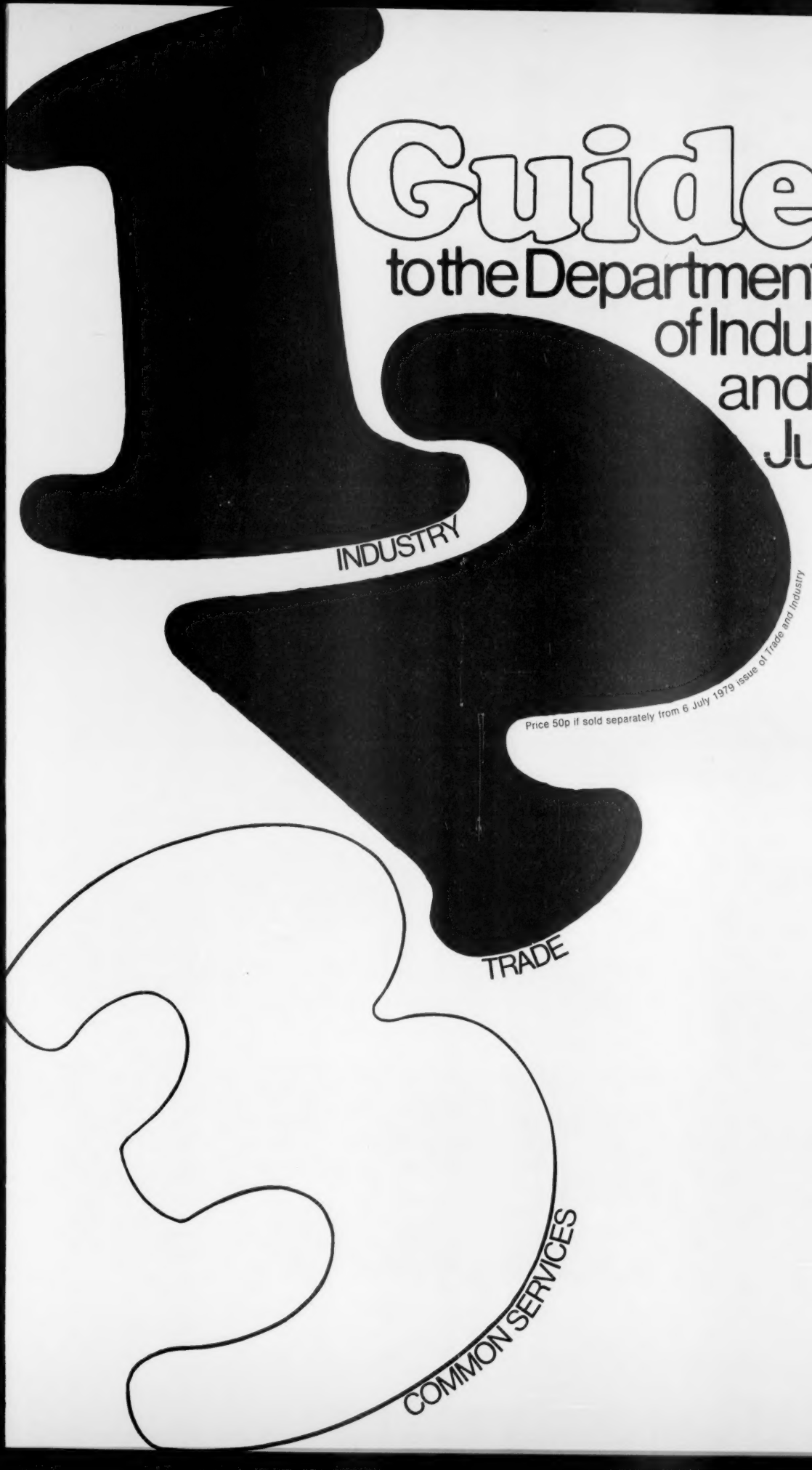
Although only in its third year, this event is already considered by many to be the leading event of its kind in Europe, and this year the number of international visitors increased by some 50 per cent.

A number of UK firms, such as Crown Decorative Products Ltd, have exhibited at the show since it began. Crown, which has established a sales operation in France, has successfully adapted the English 'look' in wallpapers, to this particular market. At the event the firm saw all its major French customers – wholesalers and large retailers – and it also made contact with peripheral markets as far away as south America and the far east.

Osborne and Little, a small company specialising in fluid-blocked wall-coverings, showed a range of designs and colours that drew favourable comments from the organisers of the show. So it was scarcely surprising that the firm found that this, their first appearance at the event, had been its best show anywhere. Coloroll Ltd, also exhibiting directly for the first time, was very satisfied with results.

Of the companies exhibiting rugs and blankets, Taftex Ltd – relatively new to the French market – succeeded in appointing two distributors.

Guide to the Departments of Industry and Trade July 1979

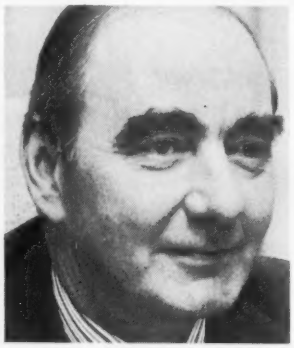


Price 50p if sold separately from 6 July 1979 issue of *Trade and Industry*

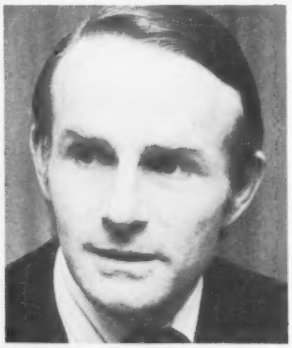
Department of Industry

The department is responsible for general industrial policy, and for the industrial component of regional policy, including financial assistance to industry under the Industry Act (except that certain regional industrial policy functions in Scotland and Wales are now exercised by the Scottish and Welsh Offices). It sponsors individual manufacturing industries, including iron and steel; is responsible for nationalised industries – British Aerospace, British Shipbuilders, The British Steel Corporation and the Post Office. The department is responsible for technical services to industry, and for industrial research and development, including civil aerospace research and the supervision of the industrial research establishments of the former Department of Trade and Industry. The Design Council and the National Research Development Corporation also come within its sphere.

Secretary of State for Industry
Sir Keith Joseph
Has overall responsibility for the work of the department, including government policy towards small firms.



Minister of State
Lord Trenchard
Responsible for the following priviate sector industries (except for subsidiaries of the National Enterprise Board): chemicals and textiles; mechanical equipment, electrical engineering and process plant; mechanical engineering; vehicles; computers and electronics; paper, timber, minerals, metals and other manufacturing. Other responsibilities include regional policy and research and development. Departmental spokesman in the House of Lords.



Minister of State
Adam Butler
Responsible for aerospace; shipbuilding and shiprepairing; the Post Office; steel (including the private sector); Cable and Wireless; and the National Enterprise Board and its subsidiaries.

Parliamentary Under Secretary of State
David Mitchell
Assists Lord Trenchard. Also assists the Secretary of State in his responsibility for small firms.

Parliamentary Under Secretary of State
Michael Marshall
Assists Mr Butler.

Headquarters organisation

Permanent Secretary Sir Peter Carey
Head of the Government Accountancy Service and Accountancy Adviser to the Department of Industry K. J. Sharp [1]
The chart below is not intended to show the relative status of the posts

Deputy Secretary	Division or department		Head of division
Miss A. E. Mueller[2]	Regional Policy and Development Grants	RPDG	L. Lightman
	Regional Support and Inward Investment	RSI	K. G. H. Binning
	Small Firms	SF	I. H. Lightman
R. H. Bonham Carter Director	Industrial Development Unit	IDU	H. L. Cousins
		Deputy Directors	B. A. Smouha C. F. H. Morland M. H. Peacock
R. H. W. Bullock	Computers, Systems and Electronics	CSE	W. R. Atkinson
	Machine Tools and Mechanical Engineering	M	D. M. Dell
	Vehicle	V	W. R. G. Bell
	Mechanical Equipment, Electrical Engineering and Process Plant	MEP	D. C. Clark
	Electronics Applications	LA	J. H. Major
Dr D. S. Davies Chief Scientist and Engineer	Research and Technology Requirements and Space	RTS	E. S. Mallett
	Research and Technology Requirements and Perspectives	RTP	Dr J. A. Catterall
	Research Establishment Management	REM	Dr P. Dean
	Industrial research establishments:		*Director:*
	Computer Aided Design Centre		J. W. Nichols
	National Engineering Laboratory		D. H. Mallinson
	National Maritime Institute		J. W. Nichols
	National Physical Laboratory (Including British Calibration Service)		Dr P. Dean
	Warren Spring Laboratory		Dr A. J. Robinson
	Laboratory of the Government Chemist		*Government Chemist:* Dr H. Egan
R. E. Dearing	Air	Air	C. J. Farrow
	Concorde and Nationalisation Compensation	CNC	J. H. McEnery
	Shipbuilding Policy	SBP	A. C. Russell
	Posts and Telecommunications	PT	R. H. F. Croft
P. W. Ridley	Chemicals and Textiles	CT	P. G. Hudson
	Iron and Steel	IS	S. J. Gross
	Paper, Timber, Minerals, Metals and Misc. Manufactures	PTM	I. H. Lightman
A. J. Lippitt	Industrial and Commercial Policy	IC	E. J. D. Warne
	International Industrial and Commercial Policy	IIC	C. B. Benjamin
	Industrial Planning	IP	J. Leeming
	Co-ordination of schemes under section 8 of Industry Act 1972		
	Information	Inf	J. Woodrow
	Parliamentary Branch	PB	J. T. Costin

Industrial Adviser: vacant

Divisions providing a common service to the Departments of Industry and Trade are shown on page 13.

[1] Mr Knox of ASD (Common Services, page 13) reports to Mr Sharp. [2] The regional directors and the industrial directors/advisers in the regional offices responsible for the main assisted areas, also report to Miss Mueller.

London addresses

Code	Address	Telephone	Telex
ASH	ASHDOWN HOUSE, 123 VICTORIA STREET, SW1E 6RB	01-212 7676	8813148
AB	Abell House, John Islip Street, SW1P 4LN	01-211 3000	
DB	Dean Bradley House, 52 Horseferry Road, SW1P 2AG	01-212 7676	
K	Kingsgate House, 66–74 Victoria Street, SW1 6SJ	01-212 7676	8811074/5
MT	Millbank Tower, Millbank, SW1P 4QU	01-211 3000	918829

Regional offices are given on page 6. Each divisional entry overleaf includes an address code to indicate its location.

Department of Industry

Address code, page 3
Index, page 14

1
Regional Policy and Development grants. Regional industrial, inner-city and rural area policy. Local authority powers to assist industry. Designation and promotion of assisted areas. Industrial development certificates. Organisation and functions of the department's regional offices and liaison with related divisions of the Scottish Office, Welsh Office and Department of Commerce in Northern Ireland. Regional policy in relation to the EEC including the European Regional Development Fund. Administration of regional development grants under the Industry Act 1972 and residual work on investment grants under the Industrial Development Act 1966. (AB)

2
Regional Support and Inward Investment Division. Selective financial assistance for manufacturing and service industries under section 7 of the Industry Act 1972; Factory building and leasing in assisted areas (through the English Industrial Estates Corporation); promotion of direct investment from abroad into the UK (Invest in Britain Bureau). (K)

3
Small Firms. The focal point within government where the needs of small firms can be seen as a whole. Central management and development of the small firms service. Industrial co-ownership and liaison with the Co-operative Development Agency. (AB)

4
Industrial Development Unit. Assessment of the needs of industrial development and their resolution; national financial assistance under Section 8 of the Industry Act 1972; appraisal of major applications for selective financial assistance. (K)

5
Chemicals and Textiles. Sponsorship of textiles, man-made fibres, clothing, leather, footwear, tobacco, chemicals, rubber, plastics, fertilisers, toiletries and sundry related industries. (ASH)

6
Computers, Systems and Electronics. Sponsorship of the electronics industry (other than automation and instruments) including the computer industry (hardware and software), electronic components, telecommunications, electronic consumer and capital goods, and broadcasting equipment. (DB)

7
Machine Tools and Mechanical Engineering. Sponsorship of the metal and woodworking machine-tool, welding, manufacturing and mining machinery, and other mechanical engineering products industries. (ASH)

8
Vehicle. Sponsorship of the motor vehicle, motor vehicle component, engine, motor and pedal cycle, tractor and agricultural equipment, caravan and trailer industries, together with the associated distribution and repair industries, petrol retailing and car hire. (ASH)

9
Mechanical Equipment, Electrical Engineering and Process Plant. Sponsorship of the mechanical handling, construction, surface finishing and fluid power equipment: process plant: foundry, dredging and anti-pollution equipment industries. Promotion of low cost automation. (ASH)

10
Electronics Applications. General responsibility for the encouragement of electronic, particularly microelectronic, applications industries in UK industry. Sponsorship of the instrumentation and automation industries, including industrial automation systems and their application to industrial problems. Management of the microprocessor applications project; co-ordination of the product and process development scheme. (DB)

11
Paper, Timber, Minerals, Metals and Miscellaneous Manufactures. Industrial raw materials supply policy including mineral development in the UK. Administration of the Mineral Exploration and Investment Grants Act 1972. Waste management policies including the National Anti-Waste Programme. Sponsorship of paper and board, timber, non-ferrous metals (including non-ferrous foundries) and miscellaneous manufactures industries, including pottery, glass, cutlery, furniture, etc. (ASH)

12
Shipbuilding Policy. Technological and sponsorship responsibilities for the shipbuilding, shiprepairing, boat building, slow speed diesel engine, marine equipment and hovercraft industries. Financial responsibilities at HQ for all proposals involving selective assistance to shipbuilding firms under sections 7 and 8 of the Industry Act 1972 including the intervention fund and cost escalation insurance. Administration of shipbuilding credit and grant schemes under sections 10 and 11 of the Industry Act 1972. Implementation of the Aircraft and Shipbuilding Industries Act for shipbuilding, shiprepairing and slow-speed diesel marine engine building industries. Relations with British Shipbuilders. (ASH)

13
Iron and Steel. Policy relating to the iron and steel industry. Administration of the Iron and Steel Acts. BSC organisation, finance, investment and closures. Sponsorship of the private sector iron and steel industry and the ferrous foundry industry. (ASH)

14
Air. Sponsorship of the aircraft, aero-engine and aircraft equipment industries. Government investment in British Aerospace and in civil aircraft and aero-engine projects, including RB211 financing. International matters in the aircraft, aero-engine and aircraft equipment fields, including civil aircraft, aero-engine and aircraft equipment exports. Technical and market assessment of current and future civil aircraft and air transport systems. Co-ordination of the department's interest in defence matters. (ASH)

15
Concorde and Nationalisation Compensation. British government policy on Concorde; supervision of the approved programme. Negotiation of compensation under the Aircraft and Shipbuilding Industries Act 1977. (ASH)

16
Research and Technology Requirements and Space. Ship and marine technology, mechanical engineering and machine tools, garment and allied industries, and electrical technology R and D requirements boards; and Chief Scientist's board which covers other technologies. The boards determine the objectives and balance of the department's research and development programmes and the broad allocation of funds, further the practical application of technology and commission R and D work. Transfer of technology to industry. National Electronics Council, National Research Development Corporation and Design Council. Information on overseas science and technology, Scientific Counsellor reports, etc. Technical information services. Research and technological demonstration programmes on civil aircraft, aero-engines, aircraft equipment and civil space applications. International space interests, European Space Agency (applications programmes). Sponsorship of the space industry. (AB)
Technology Reports Centre (St Mary Cray, Orpington, Kent BR5 3RF, tel. Orpington 32111). Information service for industry on UK government and overseas R and D, operates 'Tech Alerts', a selective dissemination service, operates an on-line terminal to the data banks of the European space documentation service and other computer retrieval systems.

17
Research and Technology Requirements and Perspectives. Chemicals and minerals, engineering materials, and metrology and standards R and D requirements boards, which determine the objectives and balance of the department's research and development programmes and the broad allocation of funds, further the application of technology and commission R and D work. Departmental interest in government-financed research in universities, research councils and other departments. Departmental energy activities, EEC R and D programmes, and Laboratory of the Government Chemist's requirements committee. Advice on general science and technology policy issues and on co-ordination of R and D resources; studies on policy, organisation and long-term strategy. (AB)

18
Research Establishment Management. Responsibility for co-ordinating the management of the research establishments (REs) and through the council of the REs for co-ordinating the development

of the research programmes and facilities, and of corporate marketing and exploitation strategy; representing the REs across the department and with major other departmental customers and at requirements boards; administration of financial and manpower matters at the REs including estimates and public expenditure survey forecasts. Membership of the council consists of directors of the REs under the chairmanship of Dr D. S. Davies, Chief Scientist and Engineer, with Dr P. Dean as executive deputy chairman. (AB)

19
Research establishments, etc. *National Physical Laboratory* (Teddington, Middx, tel. 01-977 3222, telex 262344). The laboratory is the national standards laboratory; it deals with measurement and the technical aspects of specification. The laboratory is also concerned with acoustics, computer usage and numerical analysis. *British Calibration Service* provides authenticated certification of the accuracy of measuring instruments of all kinds, with traceability of such calibrations to the national standards.
Warren Spring Laboratory (Gunnels Wood Road, Stevenage, Herts SG1 2BX, tel. Stevenage 3388, telex 82250). Provides research services, advice and consultancy on: bulk materials handling technology for powders, pastes and slurries; microprocessor based control systems and on-line analytical systems; mineral and metallurgical processing technology, materials recovery from domestic and industrial wastes; air and oil pollution measurement and abatement.
National Engineering Laboratory (East Kilbride, Glasgow G75 0QU, tel. East Kilbride 20222, telex 77588). Design research, development and test facilities are available in the fields of fluids and fluid machinery, machine tool control, engineering materials and structures, hydraulic fluid power, heat transfer, offshore engineering technology, and many other aspects of mechanical engineering. The research programme is drawn up to meet the needs of industry; sponsored investigations are also undertaken on behalf of industrial firms, from whom inquiries are welcomed. The laboratory is well equipped with the most modern facilities.
National Maritime Institute (Feltham, Middx, tel. 01-977 0933, telex 263118). The National Maritime Institute with headquarters at Feltham (Middx) was set up in 1976 to continue and develop the maritime experimental work formerly carried out by the National Physical Laboratory, whose relevant staff and facilities have been transferred to the new institute. The institute is ideally equipped to undertake maritime experimental work for industry in addition to providing scientific support for government departments. Inquiries from commercial interests for consultation and the use of the extensive facilities are welcomed, such work being undertaken in complete confidence to the client.
Laboratory of the Government Chemist (Cornwall House, Stamford Street, London SE1 9NQ, tel. 01-928 7900). The functions of the laboratory are: 1. to discharge the statutory responsibilities of the Government Chemist; 2. to provide a comprehensive service of analysis, advice and studies based on chemistry in the public sector (government departments, other official public institutions, local authorities and official international organisations) and, where appropriate, the private sector; and 3. to conduct research in areas appropriate to the above.
Computer-aided Design Centre (Madingley Road, Cambridge CB3 0HB, tel. Cambridge 63125). Development of computer-aided design systems for chemical, mechanical, electrical electronic and civil engineering, building, construction and industrial design.

20
Industrial Adviser. Seconded from a trade union for two years. Provides advice to ministers and senior officials particularly on trade union aspects over the whole range of the department's activities, and to other departments. (V)

21
Industrial and Commercial Policy. General industrial policy, and focal point for the department's interest in economic, financial, fiscal, trade and manpower issues, productivity, marketing etc. Co-ordinating responsibility for section 8 Industry Act schemes and for the department's longer term work. (ASH)

22
International Industrial and Commercial Policy. International aspects of industrial policy and the industrial implications of external policies. Focal point with the department for EEC matters and for industrial policy work within other international organisations. Departmental interest in major overseas investment projects. (ASH)

23
Industrial Planning. Matters concerning the National Enterprise Board. Focal point for department's interest in social and environmental policies, Industry/Education Unit, and highly qualified manpower. Also provides some common services for the Department of Trade. (ASH)

24
Information. The public presentation of departmental policies, activities and services through press, radio and TV, and publicity services generally. The department's Chief Information Officer is also responsible for the information work of Common Services (see page 13). (ASH)

25
Posts and Telecommunications. *Sponsorship of the Post* Office's postal, telecommunications, data processing, and Giro and remittance services businesses; this includes borrowing and capital investment matters; planning; incomes policies; board appointments; constitutional, legislation and land questions. *Sponsorship of Cables and Wireless Ltd.* Nationalised industries: co-ordination of departmental policy. Governmental aspects of international postal and telecommunications relations, including International Telecommunication Union (ITU), Universal Postal Union (UPU), CEPT, EEC and Commonwealth Telecommunications Organisation (CTO) matters. (ASH)

26
Parliamentary Branch. Responsible for co-ordinating the department's parliamentary work – public and private bills, subordinate legislation (except Select Committees), and parliamentary questions, etc. (ASH)
Common Services. Accountancy Services; Economics and Statistics; Establishment; Finance and Economic Appraisal; Solicitor's Department. These divisions serve the Departments of Industry and Trade (see page 13).

Address code page 3

Regional Development Grants Offices

Billingham
Department of Industry, Regional Development Grants Office, Queensway House, West Precinct, Billingham, Cleveland TS23 2NF. Tel. (0642) 553671. Telex 58608. Answer back: 58608 RDGBIL G.
Director: G. Waldron
Area for which responsible: Cleveland, Cumbria (excluding Barrow-in-Furness, Dalton-in-Furness, Grange-over-Sands and Ulverston), Durham, Humberside, Northumberland, Tyne and Wear, and Yorkshire; also the intermediate areas of Gainsborough, Horncastle, Louth, Mablethorpe and Skegness.

Bootle
Department of Industry, Regional Development Grants Office, St Peter's House, Stanley Precinct, Bootle, Merseyside L20 3LZ. Tel. 051-922 4030. Telex 627162. Answer back: 627162 RDGBOT G.
Director: L. Fouweather
Area for which responsible: Cheshire, parts of Cumbria (Barrow-in-Furness, Dalton-in-Furness, Grange-over-Sands and Ulverston), Greater Manchester, Lancashire and Merseyside; also the intermediate areas of Alfreton, Chesterfield, Clay Cross, Eckington, Heanor, the High Peak District and Stavely in Derbyshire, Sutton-in-Ashfield and Worksop in Nottinghamshire and Oswestry in Salop.

Cardiff
Department of Industry, Regional Development Grants Office, 24-26 Newport Road, Cardiff CF2 1SY. Tel: (0222) 492611. Telex 49538. Answer back: 49538 RDGCAR G.
Director: C. A. Martin
Area for which responsible: Wales, Cornwall (including the Isles of Scilly) and the assisted areas of Devonshire. This office also deals with residual questions on the derelict land clearance areas of Derbyshire, Leicestershire, Nottinghamshire and Staffordshire.

Glasgow
Department of Industry, Regional Development Grants Office, Magnet House, 59 Waterloo Street, Glasgow G2 7BT. Tel: 041-221 9833.
Telex 77611. Answer back: 77611 RDGGLA G.
Director: H. J. Henson
Area for which responsible: Scotland.

EEC Information Unit

Millbank Tower, Millbank SW1P 4QU (01-211 7060).

The EEC Information Unit provides a free service for businessmen by answering general questions about EEC policy, procedures and legislation and by guiding them where necessary to specialist sources of information

Department of Industry

Regional and District Offices

The Department of Industry's main regional network is based on its eight regional offices in England.

The regional offices represent the department in its dealings with industry, local authorities, the regional offices of other government departments and other local bodies and organisations. The regional offices are also responsible for administering selective assistance to industry in assisted areas and for other aspects of regional industrial development. Some activities are also undertaken by the regional offices on behalf of the Department of Trade, such as export promotion, while the regional offices also serve the Department of Energy.

In addition some parts of the work of these departments are handled through specialist local offices, including offices dealing with regional development grants and the residual investment grants under the Department of Industry and HM Coastguard, Mercantile Marine Offices, Marine Survey Offices and the Official Receivers in bankruptcy and company liquidation under the Department of Trade.

Regional development and investment grants offices are listed on page 5.

North
Northumberland, Tyne and Wear, Cleveland, Durham and Cumbria (except the Employment Office areas of Barrow-in-Furness, Dalton-in-Furness, Ulverston and Grange-over-Sands)
Regional Director: R. L. Sutton
Industrial Director: H. T. Hill
■ ● Regional Office: Stanegate House, The Groat Market, *Newcastle upon Tyne* NE1 1YN (Newcastle upon Tyne (0632) 24722, Telex 53178).
● District Office for Cumbria: Town Hall, *Cockermouth*, Cumbria CA13 9NP (Cockermouth (0900) 823498, Telex 64173).

North-West
Cheshire, Lancashire, Merseyside, Greater Manchester, High Peak District of Derbyshire and that part of Cumbria in the Employment Office areas of Barrow-in-Furness. Dalton-in-Furness, Ulverston and Grange-over-Sands
Regional Director: A. McDonald
Regional Industrial Adviser: C. P. Sweet
■ ● Regional Office: Sunley Building, Piccadilly Plaza, *Manchester* M1 4BA (061-236 2171, Telex 667104).
Sub Office for Merseyside: 1 Old Hall Street, *Liverpool* L3 9HJ (051-236 5756,).

Yorkshire and Humberside
North, South and West Yorkshire and Humberside
Regional Director: P. E. Dougherty
Regional Industrial Adviser: vacant
■ ● Regional Office: Priestley House, 1 Park Row, *Leeds* LS1 5LF (Leeds (0532) 443171, Telex 557925).

West Midlands
Salop, West Midlands Metropolitan County, Staffordshire, Warwickshire, Hereford and Worcester
Regional Director: A. A. George
● Regional Office: Ladywood House, Stephenson Street, *Birmingham* B2 4DT (021-632 4111, Telex 337021).

East Midlands
Nottinghamshire, Derbyshire (except High Peak District), Leicestershire, Lincolnshire and Northamptonshire
Regional Director: J. Hall
● Regional Office: Severns House, 20 Middle Pavement, *Nottingham* NG1 7DW (Nottingham (0602) 56181, Telex 37143).

London and south-east
Greater London, Kent, Surrey, Sussex, Hampshire and Isle of Wight
Regional Director: A. C. Coging
Regional Office: Charles House, 375 Kensington High Street, *London* W14 8QH (01-603 2060, Telex 25991).

■ Regional Industrial Director/Adviser (in addition to Regional Director).
● Offices providing services for British exporters (services for British exporters in the London and south-east and eastern regions are provided by the Department of Trade's headquarters' Export Services and Promotions Division).

South-west
Cornwall (including Isles of Scilly), Devon, Somerset, Wiltshire, Gloucestershire, Avon and Dorset
Regional Director: R. C. McVickers
Regional Industrial Adviser: P. S. Rowlands
● Regional Office: The Pithay, *Bristol* BS1 2PB (Bristol (0272) 291071, Telex 44214).
■ South-Western Industrial Development Office: Phoenix House, Notte Street, *Plymouth* PL1 2HF (Plymouth (0752) 21891/4, Telex 45494).

East
Bedfordshire, Berkshire, Buckinghamshire, Essex, Hertfordshire, Oxfordshire, Cambridgeshire, Norfolk and Suffolk
Regional Director: B. Feinstein
Regional Office: Charles House, 375 Kensington High Street, *London* W14 8QH (01-603 2070, Telex 25991).
District Office for certain matters for Bedfordshire, Berkshire, Buckinghamshire, Hertfordshire and Oxfordshire: Market Place House, *Reading*, Berks RG1 2EN (Reading (0734) 581261).

Scotland, Wales and Northern Ireland
The Industrial Development Division of the Scottish Economic Planning Department (SEPD) in Glasgow and the Welsh Office Industrial Department in Cardiff, in addition to exercising those industrial functions which have been transferred to the Scottish and Welsh Secretaries of State, carry out certain functions for the Department of Industry on an agency basis.

Scotland
A. G. Manzie, Under-Secretary, Industrial Development Division of the Scottish Economic Planning Department.
Industrial Adviser: vacant
● Office for the whole of Scotland: Alhambra House, 45 Waterloo Street, Glasgow G2 6AT (041-248 2855, Telex 777883).
● District Office for the Highlands and Islands and North East Scotland: Caledonia House, 63/67 Academy Street, *Inverness* IV1 1LU (Inverness (0463) 30867/8).

Wales
J. H. Clement, Director, Industry Department of the Welsh Office.
Industrial Director: vacant
● Office for the whole of Wales: Government Buildings, Gabalfa, *Cardiff* CF4 4YL (Cardiff (0222) 62131, Telex 49267).
District Office for North Wales: Government Buildings, Dinerth Road, *Colwyn Bay*, Clwyd (Colwyn Bay (0492) 44261).

Northern Ireland
D. Fell, Assistant Secretary, Department of Commerce, Northern Ireland.
● Office for the whole of Northern Ireland: Chichester House, 64 Chichester Street, *Belfast* BT1 4JX (Belfast (0232) 34488, Telex 747025).
Mr Manzie, Mr Clement and Mr Fell act as the equivalent of the regional director for the Department of Industry, and the industrial advisers for Scotland and Wales, as the equivalent of the regional industrial director/adviser

Small Firms Information Centres

The Department of Industry in association with the Scottish Office and the Welsh Office operates a chain of 11 Small Firms Information Centres throughout Great Britain. The centres are designed to offer a free signposting service to small firms and people wishing to establish a business and to assist small firms in finding the right sources of help for their problems. Correspondence should be addressed 'Small Firms Information Centre'.

Birmingham. 53 Stephenson Street, Birmingham B2 4DH (021-643 3344, Telex 337919).
Bristol. Colston Centre, Colston Avenue, Bristol BS1 4UB (0272 294546, Telex 449650).
Cardiff. 16 St David's House, Wood Street, Cardiff CF1 1ER (0222 396116, Telex 497515).
Glasgow. 57 Bothwell Street, Glasgow G2 6TU (041-248 6041, Telex 779334).
Leeds. 1 Park Row, City Square, Leeds LS1 5NR (0532 445151, Telex 557687).
Liverpool. 1 Old Hall Street, Liverpool L3 9HJ (051-236 5756, Telex 628013).
London. 65 Buckingham Palace Road, London SW1W 0QX (01-828 2384, Telex 917920).
Luton. 35 Wellington Street, Luton LU1 2SB (0582 29215, Telex 826115).
Manchester, Peter House, Oxford Street, Manchester M1 5AN (061-832 5282, Telex 667952).
Newcastle. 22 Newgate Shopping Centre, Newcastle upon Tyne NE1 5RH (0632 25353, Telex 537429).
Nottingham. 48-50 Maid Marian Way, Nottingham NG1 6GF (0602 49791, Telex 377313).

Offices of the Department of Industry; the industrial divisions of the Scottish and Welsh Offices; and of the Department of Commerce, Northern Ireland

Department of Trade

Overseas trade. The department is responsible for commercial policy and relations with overseas countries and is concerned with economic policies affecting the international position of the United Kingdom. It promotes United Kingdom commercial interests overseas, negotiates on trade and commercial matters, and administers United Kingdom protective tariffs. Under the direction of the British Overseas Trade Board, which was set up in January 1972 and has the Secretary of State for Trade as President, the department promotes British exports, providing an export information service to industry and commerce, largely through the eight regional offices, and handling government support for overseas trade fairs. The Export Credits Guarantee Department is a separate department responsible to the Secretary of State for Trade, providing a credit insurance facility, and guaranteeing finance, for exported goods and services.

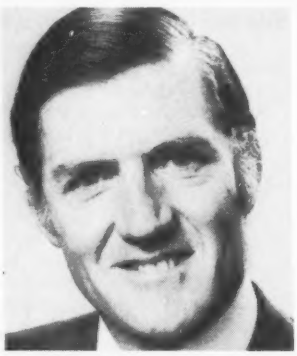
Competition and consumer affairs. The department is responsible for competition policy and administers powers under fair trading legislation for monopolies, mergers and restrictive practices. It deals with consumer protection and representation generally and is responsible for policy on consumer safety, consumer credit, quality assurance, standards, weights and measures (including metrication).

Shipping and civil aviation. The department is the sponsor for the United Kingdom shipping and civil aviation industries including the conduct of international negotiations. It is also responsible for the regulation of marine safety. It also sponsors the British Airways Board, the British Airports Authority and the Civil Aviation Authority, and approves the capital investment of these bodies. In addition, the department issues policy guidance to the Civil Aviation Authority and administers the authority's annual grant until such time as full recovery of costs is attained.

Commerce and industry. The department is responsible in general for the basic legal framework for the regulation of industrial and commercial enterprises, administering a number of statutes governing company affairs and insolvency. It also holds general responsibility for company law, patent, trade mark and copyright matters, and for all matters affecting insurance. The Department of Trade is also the sponsor department for tourism and the hotel and travel industries; the newspaper, printing and publishing industries; the film industry and the distributive and service trades.

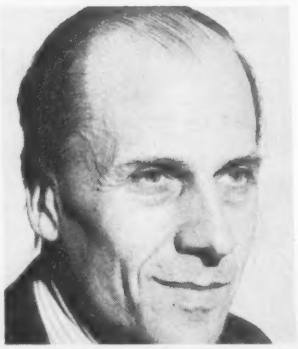
Secretary of State for Trade and President of the Board of Trade
John Nott

Minister of State for Consumer Affairs
Sally Oppenheim
Special responsibility for:
Competition policy, monopolies and mergers, restrictive practices, consumer protection and information, consumer safety, trading standards, metrication, National Consumer Council, nationalised industries consumer councils, consumer credit, product liability, advertising.



Minister of State for Trade
Cecil Parkinson
Special responsibility for:
Overseas trade policy, including EEC questions, commercial relations and tariffs, Export Credit Guarantee Department, British Overseas Trade Board.

Parliamentary Under Secretary of State for Trade
Reginald Eyre
Special responsibility for:
Companies and insurance supervision, insolvency service and Patents Office, distributive and service trades, consumer advisory services, and statistics.



Parliamentary Under Secretary of State for Trade
Norman Tebbit
Special responsibility for:
Civil aviation, marine and shipping policy, tourism, hotel and travel industries, newspaper, film and publishing industries.

Headquarters organisation

Permanent Secretary: Sir Kenneth Clucas

The chart below is not intended to show the relative status of the posts

Deputy Secretary	Division or department		Head of division
S. D. Wilks Chief Executive **British Overseas Trade Board**	Export Services and Promotions Export Development Special Adviser on Japanese market	ESP ED	J. F. J. Jardine D. N. Royce E. J. Field
R. W. Gray	General Division [1] [2] Commercial Relations and Exports [3]	Gen CRE1	G. Lanchin S. Abramson
W. M. Knighton	Commercial Relations and Exports 2 Commercial Relations and Exports 3 Commercial Relations and Exports 4 Commercial Relations and Exports 5	CRE2 CRE3 CRE4 CRE5	G. R. Sunderland Miss M. J. Lackey R. A. Browning R. Williams
P. A. R. Brown	Patent Office Insurance Companies Insolvency Service Publishing, Tourism, Films and Distribution	Pats I C InsS PTFD	I. J. G. Davis M. H. M. Reid Miss E. M. Llewellyn-Smith E. G. Harper D. Eagers
J. R. Steele	Civil Aviation Policy Civil Aviation International Relations Shipping Policy Marine Chief Inspector of Accidents [4]	CAP CAIR SP MAR AIB	G. C. Dick C. W. Roberts M. S. Morris P. L. Gregson W. H. Tench
J. C. Burgh	Consumer Affairs Competition Policy Metrology, Quality Assurance, Safety and Standards	CA CP MQS	J. L. Clark D. N. Byrne E. N. Eden
	Information Parliamentary Branch	Int PB	N. Gaffin P. E. R. Cohen

Industrial Advisers: [5]
V. Robinson (Co-ordinator), D. N. McCarthy

Divisions providing a common service to the Departments of Trade and Industry are shown on page 13.

[1] Branch 3 of general division provides some common services relating to the EEC to the Departments of Trade and Industry. [2] Branch 4 of general division reports through Mr Lanchin to Mr Burgh. [3] Branch 2 of CRE1 reports through Mr Abramson to Mr Knighton. [4] Reports directly to the Secretary of State. [5] Work is also undertaken on behalf of the Department of Industry.

London addresses

Code	Address	Telephone	Telex
V	1 VICTORIA STREET, SW1H 0ET	01-215 7877	8811074/5
AT	Atlantic House, Holborn Viaduct, EC1N 2HD	01-583 8931	
BR	2-14 Bunhill Row, EC1Y 7LL	01-606 4071	
CHA	Charles House, 375 Kensington High Street, W14 8QH	01-603 4644	
CO	Companies House, 55-71 City Road, EC1Y 1BB	01-253 9393	
HH	Hillgate House, 26 Old Bailey, EC4M 7HU	01-248 5757	886143
K	Kingsgate House, 66-74 Victoria Street, SW1E 6SJ	01-212 7676	8811074/5
P	Southampton Buildings, WC2 1AY	01-405 8721	
PS	Parliament Square House, 34-36 Parliament Street, SW1A 2ND	01-233 3000	24730
S	Sanctuary Buildings, 16-20 Great Smith Street, SW1P 3DB	01-215 7877	8811074/5
SU	Sunley House, 90-93 High Holborn, WC1 6LP	01-405 6911	264084
TM	Thomas More Building, Royal Courts of Justice, Strand, WC2A 2JY	01-405 7641	
XH	Export House, 50 Ludgate Hill, EC4M 7HU	01-248 5757	886143

Some activities are undertaken on behalf of the Department of Trade by the regional and district offices of the Department of Industry (see page 6). Each divisional entry following includes an address code to indicate its location.

Department of Trade

Address code, page 9
Index, page 14

1
British Overseas Trade Board. President, Secretary of State for Trade; chairman, Lord Limerick; vice-chairman, HRH The Duke of Kent. The board consists of representatives of industry and commerce and of the Confederation of British Industry, Trades Union Congress, and the Departments of Trade and Industry, Export Credits Guarantee Department and the Foreign and Commonwealth Office. It directs the work of the Export Services and Promotions and Export Development Divisions and the Overseas Projects Group, and the Exports to Japan Unit. (V)
Exports to Japan Unit. Offers specialist advice on the Japanese market, and co-ordinates the export promotion programme for Japan, including that of the British Export Marketing Centre in Tokyo. (HH)

2
Export Development Division is responsible for: the development of the board's export promotion activities and financial control; the board's interest in education and training for overseas trade and of overseas nationals in the UK; the administration of the BOTB secretariat and for supervision of:

a *Overseas Projects Group.* Co-ordination of official support for consultants, contractors, manufacturers and bankers pursuing major contracts in large projects overseas. Assistance in certain cases from the overseas projects fund with pre-contractual expenses of firms pursuing major contracts.

b *BOTB Publicity Unit.* Publicises the board's export services, keeps the British press informed of important trade events overseas and helps exporters obtain publicity for their products and services abroad;

c *Market Entry Guarantee Scheme Unit.* Administers the scheme; and

d *Queen's Awards Office.*

3
Export Services and Promotions. Under the direction of the British Overseas Trade Board and working closely with British Diplomatic Service Posts abroad, provides, with the export sections of the Department of Industry's regional offices, the Industrial Development Division of the Scottish Economic Planning Department, the Welsh Office Industry Department, and the Department of Commerce in Northern Ireland, advice, information and assistance to British companies engaged in overseas trading. (XH)
Co-ordination Branch. Co-ordination of policy on export services. Liaison with FCO and other departments. Policy guidance on export services to regional export sections. Liaison with Technical Help to Exporters. (XH)
General Export Services Branch. Counselling service on exporting for firms in the London and south-east region and the eastern region. Advice on the use of BOTB services, provision of information on prospects and contacts in overseas markets. Help with business visits abroad. Liaison with trade associations. (XH)
Special Export Services Branch. Export marketing research scheme. Arrangements for inward missions, VIPs and other visitors from overseas. Home duty tours for commercial officers from overseas. Liaison with Export Clubs. European Components Service. British Export Trade Research Organisation (BETRO) Trust. Services to exporters of 'invisibles'. (XH)
Export Data Branch. Export Intelligence Service – a computer-based service providing subscribers with details of specific export opportunities and market intelligence on a selective basis. Collection, storage and dissemination of information on markets and marketing methods. Information on overseas tariffs and import regulations. Commercial standing of overseas firms. 'Hints to Exporters' publications. (XH)
Fairs and Promotions Branch. Supports collective participation at overseas trade fairs through the joint venture and British pavilion schemes. Organises all-British fairs and symposia, and provides support for store promotions. Provides general information on overseas trade fairs. Supports groups of British businessmen visiting overseas markets through the outward mission scheme. Liaison with organisers of UK trade fairs and exhibitions (HH)

4
Commercial Relations and Exports. Protection and promotion of UK commercial interests overseas. Treaties and trade agreements with other countries, representations on commercial matters, etc. Assisted overseas by commercial departments of missions and consulates. There are five divisions. The first is concerned with matters of general external trade policy (mainly now handled through the EEC) including GATT and UNCTAD. Three of the others have responsibility for commercial relations with individual countries and related general groupings; and generally for country-related export promotion. The remaining division, besides having certain country responsibilities, deals with export policy, general questions on export credit, export licensing and the department's overall interest in overseas aid. (V)
Responsibility also for:
International Technology Group (Culham Laboratory, Abingdon, Oxfordshire. Tel: Abingdon (0235) 21840, Telex: 83189). Responsible for implementing technological collaboration agreements between Britain and other countries; assists in technological exchanges.

5
General. Anti-dumping cases (guidance, as now mainly handled through the EEC Commission); administration of protective action against disruptive imports, of import licensing and of import duties. Duty reliefs and remission; tariff origin rules; and general questions arising on the EEC Common Customs Tariff. The division is also responsible for Department of Trade interest in NEDC matters and policy proposals arising therein (other than those of the specific responsibility of another division of the department); for the co-ordination of departmental input in respect of general economic matters, including measures to improve the performance of UK manufacturers in domestic markets; and general matters affecting the service industries. Co-ordination of the interests of the Department of Trade on general matters relating to UK membership of the European communities; Departmental link with parliamentary scrutiny committees. Co-ordination of departmental interests in investment and exchange control questions. (K)
Import licensing (CHA)

6
Companies. Review of companies legislation; harmonisation of EEC company law; inflation accounting; industrial democracy. Administration of the Companies Acts and related legislation; Prevention of Fraud (Investments) Act, Protection of Depositors Act, etc; unit trusts; relations with the accountancy profession. Consideration of applications for investigation and carrying out investigations of companies under sections 164, 165, 172 and 334 of the 1948 Companies Act; inquiries under sections 32 and 109 of the 1967 Companies Act and arrangements for supervision of the securities market. (S)
Companies Registration Office

7
Industrial Advisers. Provide industrial advice for ministers and senior officials over the whole range of the department's activities, and beyond to other departments and to NEDO, the British Overseas Trade Board, etc. The advisers have generally been directors of large companies. Each has experience of general management and more specific experience in the export and other specialised fields, and they work within government for about two years. (V)

8
Insurance. Administration of the Insurance Companies Act 1974 including the authorisation and supervision of insurers; other matters affecting the insurance industry in Great Britain; matters affecting the overseas interests of British insurers including work in intergovernmental institutions, eg EEC, OECD and UNCTAD. (S)

9
Insolvency Service. All aspects of insolvency administration, including the winding-up of companies under the Companies Acts and the failures of individuals under the Bankruptcy and Deeds of Arrangement Acts: the Insolvency Act 1976. Administration of the Official Receivers, service in the High Courts and provincial

offices. Supervision of liquidators and trustees; accounting for and management of funds. Insolvency matters affected by EEC legislation and EEC Draft Bankruptcy Convention. (BR)
Official Receivers (High Court Offices)
Bankruptcy (TM)
Companies Winding Up (AT)
Official Receivers (Provincial offices) (BR)

10
Patent Office and Industrial Property and Copyright Department. Registration of patents, designs and trade marks. Policy on these matters and on copyright (and sub-office at Baskerville House, Browncross Street, New Bailey Street, Salford M3 5FU. Tel: 061-832 9571 – Trade marks and designs only). (P)

11
Publishing, Tourism, Films and Distribution. Sponsorship of film industry, hotel industry, tourism, the printing, publishing and newspaper industries, personal service and distributive trades (other than food and drink), commercial agents. (S)

12
Civil Aviation Policy. Responsibility for civil aviation legislation and sponsorship role in relation to airlines and airports. Policy towards British Airways, British Airports Authority, and Civil Aviation Authority. Formulation of policy and co-ordination of action on civil aviation security and on aircraft noise and other environmental effects. The civil aviation safety adviser provides advice on technical and operational safety matters. (V)

13
Civil Aviation International Relations. International relations including negotiations for traffic rights covering both scheduled and non-scheduled air services. Relations with international civil aviation bodies, notably ICAO and ECAC. Secretariat of the Commonwealth Air Transport Council. EEC involvement in civil aviation matters. (V)

14
Marine. Administration of merchant shipping legislation. Safety, construction and equipment (through marine survey offices). Crew matters (through mercantile marine offices and the Registry of Shipping), marine pollution, navigational aids, work in tidal waters, etc. (SU)
HM Coastguard. Co-ordination of marine search and rescue (SU)

15
Shipping Policy. General policy questions affecting the UK merchant fleet including structure, profitability and economic health of the industry. International shipping policy issues including flag discrimination, shipping conferences, flags of convenience, law of the sea and various international conventions on shipowners' liability. Consideration of EEC shipping policy. Non-technical shipping questions arising in IMCO. Discussion and negotiation on such issues with other governments either directly or in UNCTAD, IMCO, OECD, EEC and other international fora (V)
Shipping Services. Provision of shipping and shipping intelligence services for government departments for both civil and defence purposes. (PS)

16
Accidents Investigation Branch. The investigation, in the United Kingdom, of accidents in which any civil aircraft are involved and participation in other administrations' investigations elsewhere of accidents to British registered or manufactured aircraft. Reports direct to the secretary of state. (K)

17
Consumer Affairs. Responsibility for the nationalised industry consumer councils and the National Consumer Council. Government support for local advisory services. Implementation of the Consumer Credit Act 1974. Enforcement of hire purchase and hiring controls and administration of hire purchase legislation. Liaison with the Office of Fair Trading on the consumer protection provisions of the Fair Trading Act. International aspects of consumer protection. Trade Descriptions Act and Estate Agents Act. Advertising, certification trade marks and hallmarking.

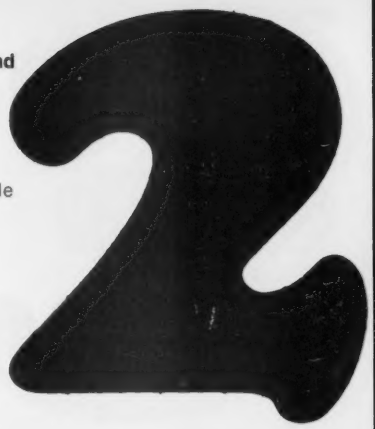
18
Competition Policy. Policy and legislation on competition, including monopolies, mergers and restrictive practices. Departmental interest in EEC competition rules.

19
Metrology, Quality Assurance, Safety and Standards. Co-ordination of government policy on standards and quality assurance and on technical barriers to trade. British participation in international standards organisations. Government support of the British Standards Institution. Co-ordination of government policy on metrication and liaison with Metrication Board. Safety of consumer goods, including fireworks. (MT)
Legal Metrology Branch. Provides a technical service for the control of weights and measures to authorities and others in discharge of the department's statutory responsibilities under the Weights and Measures Acts 1963 and 1976 and the European Communities Act 1972. (CS)

20
Information. The public presentation of departmental policies, activities and services through press, radio and TV and publicity services generally. Common Services provide other information services on behalf of the department (see page 13). (MT)

21
Parliamentary Branch. Responsible for co-ordinating the department's parliamentary work – public and private bills, subordinate legislation, parliamentary questions, etc. (MT)

22
Common Services. Accountancy Services; Economics and Statistics; Establishment; Finance and Economic Appraisal: Solicitor's Department.
These divisions serve the Departments of Industry and Trade (see page 13).



Address code, page 9

Export Credits Guarantee Department

Aldermanbury House, Aldermanbury, London EC2P 2EL (01-606 6699, Telex 883601)
A separate government department responsible to the Secretary of State for Trade. ECGD provides credit insurance for UK exporters against non-payment risks, guarantees to banks for export finance, and insurance against political risks on new overseas investments. Support is also available against cost-escalation on certain large capital goods contracts; and for performance bonds.

Headquarters organisation

Secretary and Head of Department, K. Taylor
Deputy Head of Department, K. W. Cotterill, Project Underwriting Group A
M. G. Stephens, Project Underwriting Group B
D. C. Smith, Comprehensive Guarantee Underwriting Group.
R. T. Kemp, Departmental Services Group
J. Gill (Principal Finance Officer) Finance Division

Project Underwriting Group A: Project underwriting policy and procedures. Policy on export finance including policy on guarantees to banks and financing in foreign currency. Cover against exchange rate risk between time of tender and award of contract. Specific supplier credit guarantees, buyer credits and lines of credit for Eastern Bloc countries, China, Yugoslavia, The Americas, the Caribbean and United States Pacific Isles. Cost escalation scheme for capital goods contracts of £2 million upwards.

Project Underwriting Group B: Specific supplier credit guarantees, buyer credits and lines of credit for all countries other than those for which Project Underwriting Group A is responsible. Guarantees for exports of ships, arms, aircraft, overseas construction work, services (consultancies, know-how, leasing etc). Guarantees to banks providing export finance. Guarantees for performance bonds on capital goods contracts worth £250,000 upwards. Insurance against some of the risks of consortium members' insolvency (contracts of £20 million upwards) or withdrawal (contracts of £50 million upwards). Insurance of new overseas investment against political risks.

Comprehensive Guarantee Underwriting Group: Whole turnover supplier credit insurance for continuous business by manufacturers, merchants, confirming houses or overseas subsidiaries of UK firms, involving exports of raw materials, semi-manufactures, consumer goods, consumer durables, production-line equipment and engineering goods. External trade. Overseas stockholding. Data processing. Claims. ECGD regional organisation; offices at:
Central London. Waverley House, 7-12 Noel Street, London W1V 3PB
North London. 593-599 High Road, Tottenham, London N17 6SW
South London. 320 Purley Way, Croydon, CR9 4HL
Belfast. River House, High Street, Belfast BT1 2BE
Birmingham. Colmore Centre, 115 Colmore Row, Birmingham B3 3SB
Bristol. 1 Redcliffe Street, Bristol BS1 6NP
Cambridge. 72-80 Hills Road, Cambridge CB2 1NJ
Glasgow. Fleming House, 134 Renfrew Street, Glasgow G3 6TL
Leeds. West Riding House, 67 Albion Street, Leeds LS1 5AA
Manchester. Elisabeth House, St Peter's Square, Manchester M2 4AJ

Departmental Services Group: ECGD's Parliamentary work, policy co-ordination, assessment of market conditions, relations with export credit authorities overseas, international export credit agreements, publicity.

Finance Division: Financial policy and accounts, refinancing of export credit, parliamentary estimates, premium reviews.

Department of Trade

Official Receivers' offices

Official Receivers are responsible for the administration of cases in bankruptcy and compulsory liquidation. Inquiries should be addressed to the nearest Official Receiver.

High Court of Justice
Senior Official Receiver: J. B. Clemetson.

Bankruptcy
Thomas More Building, Royal Courts of Justice, Strand, London WC2A 2JY (01-405 7641).
Official Receivers: D. A. Thorne; A. K. Sales

Companies Winding-up
Atlantic House, Holborn Viaduct, London EC1N 2HD (01-583 8931).
Official Receivers: L. R. Bates; G. B. Gillvray; H. W. J. Christmas.

Birmingham. Commercial Union House, Martineau Square, Birmingham B2 4UP (021-236 8831/7). J. F. Hirst. P. Higgins

Bournemouth. Burlington Arcade, Bournemouth BH1 2JS (0202-28208/9). C. G. Churcher.

Bradford. West Riding House, Cheapside, Bradford BD1 4LJ (0274-33651/2). K. W. Bidmead.

Brighton. Windsor House (East Entrance), 30-35 Edward Street, Brighton BN2 2JZ (0273-604301/2 and 688265/8). J. F. O'Reilly.

Bristol. Sun Alliance House, 4 Colston Avenue, Bristol BS1 4BN (0272-290268). D. S. Clackett.

Cambridge. 49 Bateman Street, Cambridge CB2 1LT (0223-58911). W. J. Llewellyn.

Canterbury. Lombard House, 12-17 Upper Bridge Street, Canterbury CT1 2NQ (0227-62070 and 65037). A. Rout.

Cardiff. 3rd Floor, Hayes House, The Hayes, Cardiff CF1 2UG (0222-30575/6 and 32381). R. G. Waldron.

Chester. Dee Hills Park, Chester CH3 5AR (0244 21471/2). K. Matthewson

Croydon. Park House, 22 Park Street, Croydon CR9 1TX (01-681 2633). R. A. D. Copper.

Exeter. Eastgate House, High Street, Exeter EX4 3JU (0392-36886). A. J. Seldon.

Gloucester. Grosvenor House, Station Road, Gloucester GL1 1ST (0452-21658/9 and 27997). H. W. Kirkwood.

Hull. Beverley House, St Stephen's Square, Hull HU1 3XF (0482-23720 and 23729). J. E. Friend.

Ipswich. St Clare House, Greyfriars, Ipswich IP1 1LX (0473-56731). B. C. Wade

Leeds. Pearl Chambers, East Parade, Leeds LS1 5BX (0532-448851). V. Duffy

Leicester. Prospect House, 94 Regent Road, Leicester LE1 7DE (0533-544024). H. Roach.

Liverpool. 2nd Floor, Barratt House, North John Street, Liverpool L2 6SZ (051-236 9131/2). K. Matthewson.

Manchester. Townbury House, 11 Blackfriars Street, Salford M3 5AB (061-832 2471). W. A. Bishop, F. A. Lanaway

Newcastle upon Tyne. 3rd Floor, 4 St Nicholas Buildings, St Nicholas Street, Newcastle upon Tyne NE1 1RF (0632-21104/5). R. Graham.

Northampton. 90 Abington Street, Northampton NN1 2BX (0604-37288/9). W. J. Llewellyn.

Norwich. Davey House, Castle Meadow. Norwich NOR 02D (0603-28983/4). B. C. Wade

Nottingham. Severns House, 20 Middle Pavement, Nottingham NG1 3DW (0602-51596/8). H. Robertson

Plymouth. 63 New George Street, Plymouth PL1 1RD (0752-68554). A. J. Seldon.

Reading. PO Box No. 40, Monarch House, 75–79 Caversham Road, Reading RG1 8AW (0734-581931/5). T. J. White

Rochester. Gordon House, Star Hill, Rochester (0634-42603 and 46906). A. Rout.

St Annes-on-Sea. Petros House, St Andrews Road North, Lytham St Annes FY8 2JD (0253-721271). J. M. Christensen.

Sheffield. 8/12 Furnival Gate, The Moor, Sheffield S1 4QN (0742-26691/3). T. Wilks.

Southampton. Western Range, 83-85 London Road, Southampton SO9 1NQ (0703-23348/9 and 23340). C. G. Churcher.

Southend. 2nd Floor, Colman House, 61 Victoria Avenue, Southend-on-Sea SS2 6EF (0702-41316/7). G. B. Sellers

Stockton. 4 Bridge Road, Stockton-on-Tees, Teesside TS18 3BP (0642-65598/9). R. Graham.

Stoke. London House, Hide Street, Stoke-on-Trent ST4 1QN (0782-45256/8). A. N. Percy.

Swansea. 5th Floor, Sun Alliance Building, 166/167 St Helens' Road, Swansea SA1 5DL (0792-42861/3). P. W. Nunn.

Watford. 40 Clarendon Road, Watford WD1 1HJ (0923-44288). F. L. Sage.

Associated organisations of the two departments

Air Travel Reserve Fund Agency. 20 Manvers Street, Bath BA1 1LX (0225-61266)

British Airports Authority. 2 Buckingham Gate, London SW1E 6JL (01-834 6621, Telex 919039).

British Hallmarking Council. PO Box 47, 41 Church Street, Birmingham B3 2DY (021-236 9021).

British Standards Institution. 2 Park Street, London W1A 2BS (01-629 9000).

British Tourist Authority. Queen's House, 64 St James's Street, London SW1A 1NF (01-629 9191).

Civil Aviation Authority. 45/59 Kingsway, London WC2B 6TE (01-379 7311).

Design Council. 28 Haymarket, London SW1Y 4SU (01-839 8000).

English Tourist Board. 4 Grosvenor Gardens, London SW1W 0DU (01-730 3400).

Hearing Aid Council. 40a Ludgate Hill, London EC4M 7DE (01-638 9226).

Metrication Board. Millbank Tower, Millbank, London SW1P 4QU (01-211 3000).

Monopolies and Mergers Commission. New Court, 48 Carey Street, London WC2A 2JE (01-831 6111).

National Consumer Council. 18 Queen Anne's Gate, London SW1H 9AA (01-222 9501).

National Computing Centre. Oxford Road, Manchester M1 7ED (061-228 6333, Telex 668962).

National Research Development Corporation. Kingsgate House, 66-74 Victoria Street, London SW1E 6SL (01-828 3400, ext. 468).

Office of Fair Trading. Field House, Breams Buildings, London EC4A 1PR (01-242 2858).

Performing Right Tribunal. Room 105, 25 Southampton Buildings, Chancery Lane, London WC2A 1AY (01-405 8721, ext. 3353).

Scottish Consumer Council. 4 Somerset Place, Glasgow G3 7JT (041-332 8858/9)

Welsh Consumer Council. 8 St Andrew's Place, Cardiff CF1 3BE (0222-396056/9).

Departments of Industry and Trade

Common Services 3

The chart below is not intended to show the relative status of the posts

Deputy Secretary	Division or department		Head of division
R. F. Prosser Principal Establishment and Finance Officer	Establishment Personnel	EP	R. M. Allott
	Establishment Management Services and Manpower	EM	G. C. Lowe
	Establishment General Services	EG	J. Fish
	Finance and Economic Appraisal	FEA	S. W. Treadgold
M. J. Kerry The Solicitor	Overseas Trade and ECGD	Sol A	T. D. Salmon
	Domestic Commercial Law and Consumer Protection	Sol B	G. A. Preston
	Prosecutions and Investigations	Sol C	M. J. Ware
	Industry and Financial Assistance	Sol D	J. B. Evans
H. H. Liesner Chief Economic Adviser	Economics and Statistics 1	EcS 1	E. H. M. Price
	Economics and Statistics 3	EcS 3	P. M. Rees
L. S. Berman Director of Statistics	Economics and Statistics 4	EcS 4	R. O. Goss
	Economics and Statistics 5	EcS 5	P. D. Dworkin
	Economics and Statistics 6	EcS 6	S. F. James
	Business Statistics Office	BSO	R. Ash
	Accountancy Services	ASD	J. A. Knox
	Information	Inf	J. Woodrow

The deputy secretaries each report to the permanent secretaries of the two departments as appropriate on matters affecting their respective departments. Mr Knox reports to Mr Sharp (shown under Department of Industry).

London addresses

Code	Address	Telephone	Telex
V	1 VICTORIA STREET, SW1H 0ET	01-215 7877	8811074/5
AB	Abell House, John Islip Street, SW1P 4LN	01-211 3000	
MH	Monsanto House, 10-18 Victoria Street, SW1H 0NQ	01-215 7877	8811074/5
MT	Millbank Tower, Millbank SW1P 4QU	01-211 3000	918829
XH	Export House, 50 Ludgate Hill, EC4M 7HU	01-248 5757	886143

Each divisional entry includes an address code to indicate its location.

1
Accountancy Services. A common service to the Departments of Industry, Trade and Energy for all accountancy questions. (MT)

2
Economics and Statistics. Economic and statistical analysis and advice; forecasts and special studies to assist in formulating economic and industrial policies; data collection and processing. There are five divisions providing a common service to the Departments of Industry and Trade, They are: industrial, regicnal and aerospace economics (EcS1); manufacturing industry – monitoring and assessment (EcS3); home economy – economics and statistics; prices and competition policy and consumer protection; shipping and aviation economics (EcS4); international trade and balance of payments (EcS5); financial statistics; statistics of research and development; statistics of the distributive and services trades (EcS6). (V)
Business Statistics Office (Cardiff Road, Newport, Gwent NP7 1XG. Tel: 0633 56111). The principal government agency for collecting and processing statistics from business firms.

3
Establishment. There are three divisions which provide common services to the Departments of Industry and Trade. Establishment Personnel – personnel management, including senior staff management; Establishment Management Services and Manpower – organisational matters, management services, manpower forecasts, complementing and staff inspection, public appointment, honours; Establishment General Services – establishment matters common to all classes, office services, libraries, training and dispersal policy. (V)
Statistics and Market Intelligence Library. A reference library for the use of the departments and the public of material on overseas markets, including large collections of economic and general statistics, catalogues of foreign manufacturers, overseas market surveys and development plans, and overseas trade and telephone directories. (XH)

4
Finance and Economic Appraisal. General financial policy and control for the Departments of Industry and Trade. Co-ordination and preparation of the estimates and PES forecasts. Development and application of criteria for evaluation of current and proposed expenditure and of the effectiveness of the expenditure programmes. Liaison and co-ordination for Exchequer and Audit Department, Public Accounts Committee and Select Committee on Expenditure. Control of accounts work and internal audit. (AB)

5
Solicitor's Department. Acts as adviser on legal matters involved in the work of the Departments of Industry and Trade, and the Export Credits Guarantee Department. It is responsible for drafting all subordinate legislation, and for prosecutions arising from department-administered acts. There are four divisions. Division A – overseas trade and ECGD; Division B – domestic commercial law and consumer protection; Division C – prosecutions and investigations; Division D – industry and industrial assistance, posts and telecommunications, patents and company law. (MH)

6
Information. Paid publicity, external and internal publications, including *Trade and Industry,* and the EEC Information Unit (see page 5). The Departments of Industry and Trade undertake the public presentation of their own departmental business (see pages 4 and 11).

Index

Accidents Investigation Branch (Aviation), 2.16
Accountancy profession, 2.6
Accountancy services, departmental, 3.1
Advertising, 2.17
Aero-engine industry *see* Aircraft industry
Aerospace industry, 1.16
Agricultural equipment, 1.8
Agricultural questions, 2.18
Air transport, 1.14
Air Travel Reserve Fund Agency, *page* 12
Aircraft *see* Civil aviation
Aircraft and Shipbuilding Industries Act 1977, 1.12, 1.15
Aircraft industry
  aero-engine projects, 1.14
  aircraft equipment, 1.14
  Concorde, 1.15
  export promotion, 1.14
  international matters, 1.14
  market assessment, 1.14
  RB211, 1.14
(*see also* Aerospace industry; Civil aviation)
Airports, 2.12
Anti-dumping investigations, 2.5
Assisted areas, 1.1, 1.2
Automation, 1.9, 1.10
Aviation *see* Civil aviation

Balance of payments statistics and forecasts, 3.2
Bankers, 2.2
Bankruptcy, 2.9
Bicycles, 1.8
Bills, parliamentary, 1.26, 2.22
Boat building industry, 1.12
Board industry, 1.11
British Export Trade Research Organisation, 2.3
Book publishing, 2.11
British Aerospace, 1.14
British Airports Authority, 2.12, *page* 12
British Airways, 2.12
British Calibration Service, 1.19
British Export Marketing Centre, Tokyo, 2.1
British Hallmarking Council, *page* 12
British Overseas Trade Board, 2.1, 2.2
British Shipbuilders, 1.12
British Shopping Weeks' and store promotions, 2.3
British Standards Institution, 2.19, *page* 12
British Steel Corporation, 1.13
British Tourist Authority, *page* 12
Broadcasting equipment, 1.6
Building *see* Construction equipment industry
Business Statistics Office, 3.2
Business visitors from overseas, 2.3
Business visits abroad, 2.3
Bicycle industry *see* Cycle industry

Cable and Wireless Ltd., 1.25
Calibration, 1.19
Capital projects overseas, 2.2
Car hire industry, 1.8
Caravan industry, 1.8
Certification of trade marks, 2.17
Chemicals, 1.5, 1.17
Civil aviation
  Accidents Investigation Branch, 2.16
  aircraft noise and nuisance, 2.12
  British Airways, 2.12
  economics and statistics, 3.2
  international relations, 2.13
  policy, 2.12
  security, 2.12
(*see also* Aircraft industry; Airports)
Civil Aviation Authority, 2.12, *page* 12
Civil Aviation Safety Adviser, 2.12
Clothing industry, 1.5, 1.16
Coastguard, HM, 2.14
Commercial agents, 2.11
Commercial interests of the UK overseas, 2.4
Commercial policy, 1.21
Commercial relations and treaties, 2.4
Commodities, 2.18
Commonwealth Air Transport Council, 2.13
Commonwealth Telecommunications Organisation, 1.25
Companies Acts, administration of, 2.6
Companies: Insurance Companies Act, 2.8
Companies Investigation Branch, 2.6
Companies' liquidation, 2.9
Companies Registration Office, 2.6
Companies (winding-up), 2.9
Company law: EEC questions, 2.6
Competition
  EEC rules, 2.18
  policy, 2.18
Components: European Components Service, 2.3
Computer industry, 1.6, 1.19
Computer-aided Design Centre, 1.19
Concorde, 1.15
Construction equipment industry, 1.9
Consultants, 2.2
Consumer
  affairs, 2.17
  Credit Act 1974, 2.17
  goods: safety, 2.19
  National Consumer Council, 2.18
  nationalised industries consumer councils, 2.18
  protection: policy, 2.19
Contractors, 2.2
Copyright, 2.10
Credit
  commercial standing of overseas firms, 2.3
  consumer credit, 2.17
  control restrictions, 2.18
  export credit policy, 2.4
  Export Credits Guarantee Department, *page* 11
Customs duties, 2.5
Cutlery, 1.11
Cycle industry, 1.8

Data processing (Post Office), 1.25
Diesel engines, marine, 1.12
Depositors, protection of, 2.6
Design Council, 1.16, *page* 12
Design registrations, 2.10
Dispersal policy, departmental, 3.3
Distributive trades, 2.11
  economics and statistics, 3.2
Dumping: anti-dumping policy and actions, 2.5

EEC *see* European Economic Community
EEC Information Unit, 3.6, *page* 5
Economic and statistical services, 3.2
Economic appraisal, 3.4
Economic policy, 1.21
Electronics, 1.6
  applications, 1.10
English Industrial Estates Corporation, 1.2
English Tourist Board, *page* 12
Establishment divisions, 3.3
Estate Agents Act, 2.17
Estimates, departmental, 3.4
European Civil Aviation Conference, 2.13
European Components Service, 2.3
European Economic Community
  civil aviation, 2.13
  common customs tariff, 2.5
  company law, 2.6
  competition rules, 2.3, 2.18
  EEC Information Unit, 3.6, *page* 5
  industrial policy, 1.22
  insolvency legislation, 2.9
  insurance industry, 2.8
  posts and telecommunications, 1.25
  regional policy, 1.1
  shipping policy, 2.15
European Space Agency, 1.16
European space documentation service, 1.16
Exhibitions, 2.3
Export clubs: liaison, 2.3
Export credit policy, 2.4
Export Credits Guarantee Department, *page* 11
Export Data Branch, 2.3
Export development, 2.2
Export finance, 2.2
Export Intelligence Service, 2.3
Export licensing, 2.4
Export Marketing Research Scheme, 2.3
Export promotion
  British Overseas Trade Board, 2.1, 2.2
  business visitors from overseas, 2.3
  business visits abroad, 2.3
  civil aircraft and aero-engines, 1.14
  education and training, 2.2
  export services and promotions, 2.3
  Exports to Japan Unit, 2.1
  Hints to Exporters, 2.3
  major contracts overseas, 2.2
  overseas market prospects, 2.3
  Statistics and Market Intelligence Library, 3.3
  Technical Help to Exporters, 2.3
  trade contacts overseas, 2.3
  trade missions, 2.3
Exports to Japan Unit, 2.1

Factories: building and leasing, 1.2
Fair trading, 2.19
  Office of Fair Trading, *page* 12
Fairs and Promotions Branch 2.3
Fertilisers, 1.5
Film industry, 2.11
Financial policy and control, 3.4
Fireworks: safety, 2.19
Food and food prices, 2.18
Footwear, 1.5
Foundry industry, 1.9, 1.11, 1.13
Fraud prevention: investments, 2.6
Furniture industry, 1.11

General Agreement on Tariffs and Trade: general policy, 2.4
Giro, 1.25
Glass Industry, 1.11
Government Chemist, Laboratory of 1.17, 1.19

Hallmarking, 2.17, *page* 12
Hearing Aid Council, *page* 12
Hints to Exporters, 2.3
Hire purchase, 2.17
Honours, 3.3
Hotel industry, 2.11
Hovercraft, 1.12

ICAO *see* International Civil Aviation Organisation
IMCO *see* Inter-governmental Maritime Consultative Organisation
Import duties, duty reliefs and remissions, 2.5
Import licensing, 2.5
Import regulations, overseas, 2.3
Imports
  protective action against disruptive imports, 2.5
Incomes, 2.17
Industrial advisers, 1.20, 2.7
Industrial co-ownership, 1.3
Industrial democracy, 2.6
Industrial Development Act, 1.1
Industrial Development Certificates, 1.1
Industrial Development Unit, 1.4
Industrial Estates Corporation, English, 1.2
Industrial planning, 1.23
Industrial policy, 1.21, 1.22
Industrial property, 2.10
Industrial technologies, 1.16
Industry
  economics and statistics, 3.2
  financial assistance, 1.2, 1.4
  Industry/Education Unit, 1.23
  Queen's Award, 2.2
  R & D information service, 1.16
  regional development, 1.1, 1.2,
  small firms, 1.3
  Small Firms, Information Centres, *page* 6
Industry Act 1972, 1.1, 1.2, 1.4
  assistance to shipbuilding firms, 1.12
Inflation accounting, 2.6
Information services, 1.16
  Industry, 1.16, 1.24
  Consumer Affairs, 2.20
  Trade, 2.20
Insolvency Service, 2.9
Instruments, scientific, 1.10
Insurance industry, 2.8
Insurance of export credits and overseas investments, *page* 11
Inter-governmental Maritime Consultative Organisation, 2.15
International Civil Aviation Organisation, 2.13
International Technology Group, 2.4
International Telecommunications Union, 1.25
International trade relations, 2.4
Invest in Britain Bureau, 1.2
Investment grants, 1.1
Investments
  British Steel Corporation, 1.13
  fraud prevention, 2.6
  insurance against political risks overseas, *page* 11
  inward investment, 1.2
  Post Office, 1.25
Inward missions, 2.3
Iron and steel industry, 1.13

Japan
  British Export Marketing Centre, 2.1
  Exports to Japan Unit, 2.1

Laboratory of the Government Chemist, 1.17, 1.19
Leather industry, 1.5
Legal matters, 3.5
Library, 3.3
Liquidation of companies, 2.9

Machine tool industry, 1.7
Man-made fibres, 1.5
Management, departmental
  accountancy services, 3.1
  dispersal policy, 3.3
  economic and statistical services, 3.2
  estimates, 3.4
  financial management, 3.4
  information services, 3.6
  organisational matters, 3.3
  research establishments, 1.18, 1.19
  staff management, 3.3
Manufacturing machinery, 1.7
Marine equipment industries, 1.12
Marine pollution, 2.14
Marine safety, 2.14
Marine search and rescue, 2.14
Marine technology, 1.12, 1.16, 1.19
Market Entry Guarantee Scheme Unit, 2.2
Marketing
  assistance to exporters, 2.3
  Statistics and Market Intelligence Library, 3.3
Materials handling, 1.9, 1.19
Materials research, 1.17
Mechanical engineering, 1.19

Mechanical engineering industries, 1.7, 1.9, 1.16
Mechanical handling, 1.9
Mercantile Marine Offices, 2.14
Merchant seamen, 2.14
Merchant shipping *see* Shipping
Mergers, 2.18
Metals, non-ferrous, 1.11
Metrication, 2.19
Metrication Board, 2.19, *page* 12
Metrology, 1.17, 2.19
Microelectronics: applications, 1.10
Microprocessors
  control systems, 1.19
  microprocessor applications project, 1.10
Mineral Exploration and Investment Grants Act 1972, 1.11
Minerals, 1.11, 1.17
Mining machinery, 1.7
Monopolies, 2.18
Monopolies and Mergers Commission, 2.19, *page* 12
Motor cycle industry, 1.8
Motor industry, 1.8

National Anti-Waste Programme, 1.11
National Computing Centre, *page* 12
National Consumer Council, 2.17, *page* 12
National Electronics Council, 1.16
National Engineering Laboratory, 1.19
National Enterprise Board, 1.23
National Maritime Institute, 1.19
National Physical Laboratory, 1.19
National Research Development Corporation, 1.16, *page* 12
Nationalised industry consumer councils, 2.17
Navigational aids, marine, 2.14
Newspaper industry, 2.11
Northern Ireland Department of Commerce, *page* 6

OECD *see* Organisation for Economic Co-operation and Development
Office of Fair Trading, 2.19, *page* 12
Official Receivers, 2.9, *page* 12
Oil pollution at sea, 2.14
Organisation for Economic Co-operation and Development
  insurance industry, 2.8
  shipping, 2.15
Origin rules, 2.5
Outward mission scheme, 2.3
Overseas aid, 2.4
Overseas commercial interests of the UK, 2.4
Overseas contracts, 2.2
Overseas firms' commercial standing, 2.8
Overseas investments, 1.22, *page* 11
Overseas Projects Group, 2.2
Overseas science and technology, 1.16
Overseas tariffs and import regulations, 2.3
Overseas trade fairs, 2.3
Overseas trade: statistics and forecasts, 3.2
Overseas trade: training, 2.2

Paper industry, 1.11
Parliamentary branches, 1.26, 2.21
Patent Office, 2.10
Pedal cycle industry, 1.8
Performing Right Tribunal, *page* 12
Personnel management, 3.3
Petrol retailing, 1.8
Planning, industrial, 1.23
Plant: process plant engineering and contracting, 1.9
Plastics, 1.5
Pollution
  aircraft noise and nuisance, 2.12
  anti-pollution equipment, 1.9
  measurement and abatement, 1.19
  oil pollution at sea, 2.14
Posts and telecommunications, 1.25
Pottery industry, 1.11
Prices
  economics and statistics, 3.2
Printing industry, 2.11
Process plant engineering and contracting industries, 1.9
Product and Process Development Scheme, 1.10
Prosecutions, 3.5
Public appointments, 3.3
Publicity, 1.24, 2.20, 3.6
Publishing industry, 2.11

Quality assurance, 2.19
Queen's Awards, 2.2

Regional and District Offices, *page* 6
Regional development, 1.1
Regional development grants, 1.1
Regional development grants offices, *page* 5
Regional industrial development, 1.1
Regional policies: economics and statistics, 3.2
Regional selective assistance, 1.2
Registry of Shipping, 2.14
Research, 1.16, 1.17
  aviation and aerospace, 1.16
  economics and statistics, 3.2
  establishments, 1.18, 1.19
  establishments, management, 1.18
  National Research Development Corporation, 1.16, *page* 12
  requirements boards, 1.16, 1.17
Restrictive trade practices, 2.18
Rubber, 1.5

Safety
  aviation, 2.12
  consumer goods, 2.19
  fireworks, 2.19
  marine, 2.14
Science and technology, overseas, 1.16
Scientific instruments, 1.10
Scottish Consumer Council, *page* 12
Scottish Economic Planning Department, *page* 6
Sea transport of government cargo, 2.15
Seafarers, 2.14
Search and rescue at sea, 2.14
Securities market, 2.6
Security: civil aviation, 2.12
Service trades, 1.5, 2.11
Shipbuilding and ship-repairing industries, 1.12
  Aircraft and Shipbuilding Industries Act 1977, 1.12, 1.15
Shipowners' liability, 2.15
Shipping
  Commercial and international relations, 2.15
  construction and equipment, 2.14
  crew matters, 2.14
  defence matters, 2.15
  economics and statistics, 3.2
  government cargo, 2.15
  legislation, 2.14, 2.15
  policy on UK fleet, 2.15
  Registry of Shipping, 2.14
  safety, 2.14
  shipping intelligence service, 2.15
Small firms, 1.3
Small Firms Information Centres, *page* 6
Solicitor's Department, 3.5
Space industry *see* Aerospace industry
Staff management, 3.3
Standards, 1.17, 1.19, 2.19
Statistical services, 3.2
Statistics and Market Intelligence Library, 3.3
Steel industry, 1.13
Store promotions overseas, 2.3
Subsidies, food, 2.18
Synthetic fibres, 1.5

Tariffs
  EEC common customs tariff, 2.5
  General Agreement of Tariffs and Trade, 2.4
  overseas tariffs, 2.3
  tariff origin rules, 2.5
'Tech Alerts', 1.16
Technical Help to exporters, 2.3
Technical information services, 1.16
Technology
  industrial technologies, 1.16
  International Technology Group, 2.4
  materials technology, 1.12, 1.17
  Queen's Award to Industry, 2.2
  technological manpower, 1.16
  transfer to industry, 1.16
Technology Reports Centre, 1.16
Telecommunications, 1.6, 1.25
Textiles, 1.5
Timber industry, 1.11
Tobacco, 1.5
Toiletries, 1.5
Tourism, 2.11
  British Tourist Authority, *page* 12
  English Tourist Board, *page* 12
Tractor industry, 1.8
Trade, overseas: statistics and forecasts, 3.2
Trade agreements with other countries, 2.4
Trade and Industry, 3.6
Trade Descriptions Act, 2.17
Trade fairs, 2.3
Trade marks
  certification, 2.17
  registration, 2.10
Trade missions, 2.3
Trade unions: industrial adviser, 1.20
Trading: fair trading, 2.19
Trailer industry, 1.8
Treaties, commercial, 2.4

Unit trusts, 2.6
United Nations Conference on Trade and Development
  commercial relations and exports, 2.4
  insurance industry, 2.8
  shipping, 2.15
Universal Postal Union, 1.25

Vehicles, motor, 1.8

Warren Spring Laboratory, 1.19
Waste management policy, 1.11
Weights and measures, 2.19
Welding machinery, 1.7
Welsh Consumer Council, *page* 12
Welsh Office Industrial Department, *page* 6

Bird's eye view of the back of Ashdown House. In the distance, 1 Victoria Street can be seen in front of Westminster Abbey.

Overseas trade country data

Australia

Tariff review programme. The Australian Minister for Industry recently announced that the government had decided to start again the tariff review programme which was suspended in 1977.

Accordingly 14 references with staggered reporting dates have been forwarded to the Industries Assistance Commission. The items falling within the first two of these references are as follows (the remainder will appear in *Trade and Industry* in the course of the next few weeks).

The first reference requests the IAC to report on whether assistance should be provided for the production in Australia of goods falling within tariff item 72.23 (casks, drums, cans, boxes and similar containers of sheet or plate iron or steel of a kind commonly used for the conveyance or packing of goods).

The second reference is for tariff items 73.25 (stranded wire, cables, cordage, ropes, plaited bands, slings and the like of iron or steel wire but excluding electric cables), 73.26 (barbed iron or steel wire, twisted hoop or single flat wire, etc, used for fencing), 73.27.1 (netting, woven wire, etc), 73.27.9 (other reinforcing fabric and similar materials of iron and steel wire, etc), 73.31 (nails, tacks, hooks, staples, spikes, drawing pins, etc), 73.33 (crochet hooks), 73.34 (pins, hair pins, curling grips and the like of iron or steel), 73.35 (springs and leaves for springs), 74.11.1 (woven goods of copper wire), 74.11.9 (other woven wire), 74.15.1 (nails, tacks, etc), 74.16 (springs of copper), 74.19.31 or 74.19.39 (pins).

The IAC is required to report to government on these by 30 June 1981.

UK firms and trade associations intending to submit evidence at the public hearings, the dates and locations of which will be published as soon as they are known, should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia, as soon as possible.

Evidence may be submitted either through the accredited agent of the firm, or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4PW, who will represent UK interest if authorised. The association charges a fee for its services, the amount varying according to the work involved in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.

Ref: CRE 1071/79
1072/79

Passenger motor vehicles. The Australian Industries Assistance Commission has issued a draft report of its inquiry into the question of assistance to the sector of industry producing these vehicles.

The draft is being made available to give interested parties an opportunity to examine and comment on it before final recommendations are made to government.

To receive submissions on the draft the commission held public hearings on 5 and 6 July.

It is hoped that a copy of the draft report will be available within the next few days.

Inquiries: OTAR 01-215 5319.

Ref: CRE 428/79

Standardisation of packaging. A notice in *Trade and Industry*, 16 February, reported that the Australian Standing Committee on Packaging (SCP) had issued an information sheet on the standardisation of sizes of certain packaged goods and the form of expressing unit prices on such packages.

A recent information sheet issued by the Department of Consumer Affairs stated that the SCP had expressed its concern at the number of breaches of the laws being detected throughout Australia for imported prepackaged articles and it was recommended to importers that before they placed orders with overseas suppliers they should consult local Weights and Measures Offices to ascertain the marking and sizing requirements of the articles they propose to import.

An information bulletin entitled 'Metric conversion and the quantity marking and standardisation of packaged goods' is available from Department of Trade, Room 363, 1 Victoria Street, London SW1H 0ET.

Inquiries: CRE 01-215 5319.

Ref: CRE 35184/2

Electric motors. A notice in *Trade and Industry*, 22 December 1978, reported that the Australian government had requested the Industries Assistance Commission (IAC) to inquire into the question as to whether short-term assistance should be accorded the production in Australia of electric motors of the following type: AC three phase, squirrel cage, totally enclosed, fan cooled, having a maximum rating of 0.746 kW or more but not exceeding 38 kW (tariff item 85.01.12).

The government has now announced that it has accepted the recommendations of the IAC that short-term assistance should not be provided.

Inquiries: CRE 01-215 5319.

Ref: CRE 1866/78

Anti-dumping – refrigerators and freezers. The Australian government has received a request from local industry for anti-dumping action to be taken against imports from Yugoslavia of domestic refrigerators of less than 300 litres and domestic freezers of the upright type between 200 and 300 litres internal capacity.

In the course of their inquiries the Australian customs will request their representative in London to seek the assistance of British manufacturers of similar products in establishing a British normal value which will be used to determine normal values in this case.

Inquiries: CRE 01-215 5319.

Ref: CRE 36493

Tin ores and concentrates. The Australian government has requested the Industries Assistance Commission to inquire into and report within 60 days on the question whether assistance should be accorded the smelting and refining in Australia of tin ores and concentrates.

UK firms and trade associations intending

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel. direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

First stop for an eight-man delegation of transducer technology from the Peoples' Republic of China Great Wall Industry Corporation was SE Labs (EMI) Ltd, Feltham. Wu Deyu, leader of the delegation, stands next to John Keat (right) the UK company's sales and marketing director, who is showing the delegation an example from SE Labs' variable-reluctance pressure transducer range. The company has traded with China for over 10 years.

to submit evidence at the public hearing, the date and location of which will be published as soon as they are known, should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia, without delay.

Evidence may be submitted either through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4PW, who will represent UK interests if authorised.

The association charges a fee for its services, the amount varying according to the work involved in the preparation of a submission and whether or not the firm involved is a member.

Inquiries: CRE 01-215 5319.

Ref: CRE 899/79

Denmark

Patent Amendment Act. A Patent Amendment Act was passed by the Danish parliament on 2 June 1978, and entered into force on 1 December 1978.

The terms of the grant of a patent has been extended from 17 to 20 years, but if an application was approved before 1 December 1978, the provisions of the 1967 Act will apply.

The amendment act contains an authorisation for the Danish government to ratify the Patent Co-operation Tready (PCT), but the ratification of the European Patent Convention (EPC) was rejected by parliament.

A translation of the amendment act is available for public inspection in the Chancery House Annexe of the Science Reference Library (Holborn Division), Chancery House, Lower Ground Floor, Chancery Lane, London WC2A 1AY.

Faroe Islands

Import duties. A Lagting Act of 19 May has altered the rate of most of the Faroëse import duties.

Inquiries about the rates applicable to commodities OTAR 01-248 5757 ext. 408/423.

France

Salt-water fish. Importers are advised that, in line with EEC directive 137/79 of 19 December 1978, from 1 July the certificate of circulation type DD5 will be replaced by document T2M. A notice to this effect was published in the French *Official Journal*, 13 June.

Copies of the French text are available on request from OTAR 01-248 5757 ext. 423/408/439.

Additives in tobacco. A notice was published in the French *Official Journal*, 13 June, providing a list of permitted additives for tobacco and related products (24.01, 24.02).

Copies of the French text of this notice are available from OTAR 01-248 5757 ext. 423/408/439.

Meat-based products. A notice was published in the French *Official Journal*, 12 June, which outlined the procedure for the import of meat-based products including factory conditions and an example of the health certificate required.

Copies of the French text are available on request from OTAR 01-248 5757 ext. 423/408/439.

Tricalcium phosphate for soft drinks. Importers are advised that a notice was published in the French *Official Journal*, 13 June, concerning the use of tricalcium phosphate as an anti-agglomerate in certain powdered preparations for non-alcoholic fruit drinks.

Copies of the French text are available on request from OTAR 01-248 5757 ext. 423/408/439.

Indonesia

Changes in duty. The Indonesian government, has announced that from 23 April there will be a change from *ad valorem* duty to specific duty on various goods. The tariff heading numbers affected are as follows:

02.01, 04.04, 08.02, 08.04, 08.06, 16.01, 16.02, 16.03, 16.04, 16.05, 17.04, 18.06, 19.03, 19.05, 19.08, 20.02, 20.05, 20.06, 20.07, 21.04, 21.07, 22.03, 22.04, 22.05, 22.06, 22.07, 34.01, 39.07, 60.04, 60.05, 61.01, 61.02, 61.03, 61.04, 61.05, 61.06, 61.07, 61.09, 62.01, 62.02, 64.02, 66.01, 69.11, 69.12, 70.13, 92.11, 92.12

Inquiries: OTAR 01-248 5757 ext. 469/468/401.

Iran

Import duties. Advance information has been received from the British embassy in Tehran concerning the 1979-80 import duties and regulations issued by the Minister of Commerce.

In general terms, the information is as follows:

Items now prohibited
Vegetables and certain plants; biscuits; sweets and chocolate (CCCN 17.04, 18.06 and 97.05); alcoholic beverages; automobiles; furniture including parts.

Items whose importation is now subject to prior approval from the Ministry of Commerce
Fish; hydrogenated vegetable oil; brake linings (CCCN 68.14); central heating including heating boilers and radiators.

Import duties have been decreased or cancelled for
Dried milk (CCCN 04.02 and 19.02); vegetable oil; parts and equipment for weighing machines; motorcycles (CCCN 87.09).

Import duties have been increased for
Leather; wood including parquet flooring and wooden doors and frames.

It must be stressed that the above information is unconfirmed and that no further details are available. As soon as precise information is available another notice will be issued.

Inquiries: OTAR 01-248 5757 ext. 475/420.

Italy

Summer closure of trade office. The British Government Trade Office in Turin will close for August. All inquiries during that period should be directed to the British Consulate General, via San Paolo 7, 20121 Milan, tel. 803442 (five lines), telex 310528 (answer back 310528 UKCON 1).

Inquiries: CRE 01-215 3310/3476.

Mexico

Tariff amendments. Acuerdos of the Secretario de Comercio published in the *Diario Oficial* of 17 and 23 May and of 1 June amended the official prices of some goods in the following tariff headings:

28.40; 29.35; 39.01; 39.02; 49.11; 51.01; 70.20; 73.12; 73.15; 73.18; 73.24; 81.04; 84.06; 84.23; 84.28; 84.38; 84.59; 84.63; 84.65; 85.01; 85.11; 85.12; 87.14; 90.16; 90.17; 90.20; 92.12

Inquiries: OTAR 01-248 5757 ext. 476/474.

Paraguay

Electrical goods. Certain electrical and luxury goods imported into Paraguay may now be sold in Pte Strossner (at the border with Brazil and close to the border with Argentina at much lower rates of tax and duty than would apply throughout the rest of the country, provided that they are imported into Pte Stroessner and sold for immediate re-export.

This move, aimed chiefly at Brazilian and Argentine tourists, will, it is hoped, stimulate the economic activities of that town and its immediately surrounding area.

Taxes and duties amounting to 20 per cent *ad valorem*, will apply to electrodomestic articles, electronic equipment, clocks and wristwatches, cigarette lighters, playing cards, vacuum flasks, fountain and ballpoint pens, photographic equipment, etc.

At present, taxes and duties on many of these items amount to between 100 per cent and 200 per cent *ad valorem* and similar rates apply in Brazil and Argentina.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Sierra Leone

Import deposit. A charge of 2½ per cent on foreign exchange allocation was imposed in the Sierra Leone's mini budget of 1 May. Two-and-a-half per cent of the face value of import licences issued has to be deposited by the importers in Leones with the Ministry of Trade and Industry's special account at Sierra Leone Commercial Bank, before the issue of import licences.

Inquiries: OTAR 01-248 5757 ext. 473.

South Africa

Import permits. The Minister of Economic Affairs authorised on 14 June, a second round of import permits for:

1 Consumer goods, clothing and confectionery equal to 40 per cent of the total value issued in 1978, bring this year's total for these categories to 80 per cent of last years, and
2 Alcoholic beverages, including whisky, equal to 25 per cent of last year's value, bringing this year's total to 65 per cent of the total value issued in 1978.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Customs tariff changes. The following amendments were published in the South African *Government Gazette*, 8 June:

R.1185, CCCN 51.04, 55.09 and 56.07: The effect of this notice is that the specific provisions for belting duck are deleted.
R.1186, CCCN 84.62: The rate of duty on journal roller bearings of the rotating end-cover type, commonly used on the axles of railway rolling stock and locomotives, with an outside diameter of not less than 170 mm but not exceeding 210 mm is increased from 3 per cent (general) and free (preferential) to 20 per cent (general).
R.1187, CCCN 87.02, 87.04 and 87.06: The effect of this notice is that: a the rate of duty on clutch cover assemblies incorporating pressure plates with an outside diameter not exceeding 310 mm and on clutch driven plates with an outside diameter not exceeding 310 mm, is increased from 75c per kg to various rates of duty; and b the clutch cover assemblies and clutch driven plates mentioned in paragraph a above need no longer be entered as specified components when they are imported as original equipment with anassembled motor vehicles.
R.1188, item 316.01, CCCN 84.62: Provision, with restrospective effect to 6 October 1978, is made for a rebate of the full duty on unworked rings for the manufacture of certain bearings.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Syria

Cement. The Syrian government has passed decree 184 of 18 March which prohibits the importation by sea of white cement and Portland cement unless certain packing and documentary conditions are fulfilled.

Details of the regulation are available from OTAR 01-248 5757 ext. 475/420.

United States

Safety standards. The *Federal Register*, 11 June, published a notice of proposed rulemaking, by the National Highway Traffic Safety Administration, to amend safety standard 214, side door strength, to allow manufacturers the option of leaving the seats in the vehicle during the tests specified in the standard.

Comments are requested on which seat adjustments should be specified in the proposed alternative requirements and on the effect modifications to side door structures may have on vehicle integrity in frontal crashes.

Comments should be sent to Room 5108, Nassif Building, 400 Seventh Street SW, Washington DC 20590, not later than 26 July.

Inquiries: CRE 01-215 5629.

Yugoslavia

Luxury goods. From 21 April the duty on the following luxury goods was increased by 50 per cent. The new rates are shown in brackets:

22.05, 22.06, 22.09, wines and spirits (37.5 per cent); 22.07, other fermented beverages (eg cider, perry-mead) (33 per cent); 22.04, cigarettes (37.5 per cent); 33.06, cosmetics (22.5 per cent)

For the following goods the new rate of duty is now 30 per cent:

69.13, porcelain products; 70.19, imitation pearls; 71.01, natural pearls; 71.02, diamonds (excluding industrial diamonds); 71.03, other artificial precious stones; 71.12, gold and silver jewellery; 71.13, goldsmiths products; 71.14, other articles of precious metal; 71.15, jewellery from pearls and precious stone; 71.16, imitation jewellery

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Overseas trade export services

New distribution cost control system

Davies and Robson (Southern), Croydon, transport and distribution consultant, is offering a new service which provides advice on methods and costs of exporting and importing freight. The service can be expanded to cover the review of administrative procedures, the introduction of controls and management information and the application of microcomputers to the shipping department.

The company feels that the majority of British exporters sell on terms that make life easy for themselves, but which do not really give the customer the service he requires and indeed obtains from many other trading nations. There is a growing awareness that Britain should offer terms that can be easily compared with alternative suppliers, and this means, Davies and Robson says, quoting delivered prices.

An added benefit of adopting delivered terms of sale is that the organiser of the freight also pays for it. This rapidly develops a much more cost-conscious and efficient approach towards the control of this vital area.

Further information: circle 537

Brantford's new Med service

Brantford International – a Furness Withy groups subsidiary – has added a new service to cover Malta and Cyprus.

The service was specifically designed to cater for the needs of exporters in the south.

There will be regular weekly container departures by conference sailings, and continuous reception facilities (Monday to Friday) are available at the Brantford International, London International Freight Terminal, at Stratford.

Commodity freight rates will apply, and handling charges will be based on a weight/measurement ratio of 1000 kg or 3 m^3.

As container stuffing will be carried out by its own staff at the Stratford terminal, Brantford offers a high measure of consignment security and control, plus an ability to ensure departures of individual consignments by nominated sailings where this is necessary.

Further information: circle 538

Pan opens Dover office

Pan Express has opened a new office at Dover to streamline its European and international movements, inbound and outbound, through the port.

The new office, and a subsidiary at Folkestone, will be managed by Clearport Ltd, Pan's agents for a number of European services, the newest of these services being a regular operation to Spain.

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Meadows produces new European 'fact finder'

Freight forwarder Thomas Meadows has produced a fifth edition of 'European fact finder'.

It is an information guide for exporters and deals particularly with European export procedures – including a step-by-step guide on how to complete a EUR 1 form. Bringing the previous edition – published last winter – up to date the new 'fact finder' also gives a range of notes on customs formalities, insurance, hazardous and awkward cargo, packing, routing options, full load services and freight rates.

Information on Meadows' TIR groupage services to Europe and Scandinavia is carried in tabular form showing depot-to-depot rate codes for service links between Meadows' UK regional centres and main towns in Europe and Scandinavia. Meadows' import and export services to and from the important market of Switzerland are also included.

A matching table gives a breakdown of rates that apply to a wide range of consignment weights, enabling shippers accurately to check shipment costs.

Further information: circle 539

Uruguay on telex line to UK

Uruguay has become the 124th country with which Britain has automatic telex links – with service opening to the capital city, Montevideo, where there are 750 telex subscribers. Autotelex is quick and more convenient because calls can be set up without the help of an international telex operator.

About 3000 calls a month are made via the operator to Uruguay and major users include exporters of machinery, petroleum products and vehicles and importers of wool, meat products, hides and skins.

Other south American countries available by direct dialling from the UK are: Brazil, Ecuador, Paraguay, Surinam, Venezuela and Colombia, in addition to parts of Argentina, Chile and Peru.

Further information: circle 540

Statistics

The economy: selected indicators[1]

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries excl. shipping	Total	of which: Manufacturing industry	Wholesalers'	Retailers'	Current balance	Visible balance	Invisible balance
	at 1975 prices		at 1975 prices			at 1975 prices				at current prices		
Base of index Series in Stock level at end-1977	1975	£ million	£ million			34,469	19,995	£ million 4,540	3,181	£ million		
1973	103.3	65 586	21 609	3 504	4 674	2 983	1 336	432	624	−967	−2 383	1 416
1974	101.4	64 215	21 173	3 822	4 605	1 459	1 288	361	−180	−3 550	−5 235	1 685
1975	100.0	63 387	20 536	3 522	3 841	−1 623	−1 221	−249	−100	−1 787	−3 236	1 449
1976	102.9	63 554	20 395	3 345	3 926	245	316	131	13	−1 072	−3 601	2 529
1977	104.9	62 983	19 961	3 573	4 325	949	442	266	29	371	−1 744	2 115
1978	108.2	66 512	20 456	3 856	4 677	1 034	597	6	333	443	−1 175	1 618
1976 3rd qtr	103.3	15 930	5 177	849	1 005	160	99	81	46	−421	−1 136	715
4th qtr	104.2	16 009	4 955	856	1 014	1 014	1 264	17	27	−292	−966	674
1977 1st qtr	103.8	15 630	4 821	851	1 030	402	235	82	117	−401	−946	545
2nd qtr	104.5	15 556	5 010	879	1 044	289	97	179	4	−253	−779	526
3rd qtr	104.9	15 872	5 057	910	1 103	−73	−6	−80	−59	513	−3	516
4th qtr	106.5	15 925	5 073	932	1 149	331	116	85	−33	512	−16	528
1978 1st qtr	106.0	16 348	5 152	923	1 162	323	38	81	62	−369	−596	227
2nd qtr	108.4	16 475	5 147	963	1 174	295	272	−62	128	208	−173	381
3rd qtr	109.3	16 853	5 132	982	1 162	304	175	45	54	154	−367	521
4th qtr	109.2	16 836	5 025	988	1 179	112	112	−59	89	450	−39	489
1979 1st qtr	107.6	17 040 p	4 922	946	1 209	432	83	100	87	−787	−11 81	394
% change last 2 qtrs on prev. 2 qtrs.	−0.4	+1.6	−3.2	−0.6	+2.2							
on a year earlier	+2.0	+5.0	−2.7	+4.3	+3.3							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count	Export	Import
	at 1975 prices		at 1971 prices	monthly averages	(not seasonally adjusted)				(old series)	thousands		thousands	at 1975 prices	
Base of index £m in base year Series in	1975	1975	1971 16,296	thousands	Jan. 1974		1975	1975	Jan. 1970	thousands		thousands	1975 19,463	1975 22,699
1973	109.5	108.3	110.3	137.1	93.5	9.1	58.8	66.7	152.1	611.0	2.6	307.0	97.7	108.8
1974	105.1	106.5	109.0	102.8	108.5	16.0	86.8	81.8	179.1	599.7[2]	2.6[2]	301.6[2]	104.2	109.7
1975	100.0	100.0	106.7	97.2	134.8	24.2	100.0	100.0	226.6	929.1	3.9	148.0[2]	100.0	100.0
1976	102.0	101.4	106.5	104.7	157.1	16.5	127.0	117.3	261.8	1 269.3[2]	5.3[2]	119.7[2]	109.7	105.6
1977	105.8	102.8	103.6	107.1	182.0	15.8	145.6	140.5	288.5	1 378.0	5.7	155.8[2]	118.9	107.2
1978	109.8	103.6	109.2	130.1	197.1	8.3	144.6	153.3	330.2	1 376.5	5.7	210.4	122.9	112.6
1977 1st qtr	105.6	103.9	103.3	102	174.1	16.5	144.8	133.0	280.2	1 333.3	5.5	..	115.9	108.8
2nd qtr	105.5	102.4	102.4	104	181.9	17.4	148.8	139.6	284.4	1 353.4	5.6	154.3	117.7	110.6
3rd qtr	106.2	103.0	104.2	110	184.7	16.5	146.5	143.8	289.1	1 403.1	5.8	153.7	124.6	107.3
4th qtr	105.8	101.8	104.7	113	187.4	13.1	142.2	145.8	300.3	1 422.2	5.9	163.6	117.3	102.3
1978 1st qtr	107.0	102.3	106.4	128	190.6	9.5	140.2	149.2	310.9	1 415.7	5.9	185.9	119.6	113.5
2nd qtr	110.7	104.5	107.9	133	195.8	7.7	146.3	151.8	327.8	1 388.6	5.7	206.3	122.2	109.7
3rd qtr	111.5	105.2	110.7	133	199.2	7.8	144.9	154.8	335.7	1 367.9	5.7	215.2	124.8	114.9
4th qtr	110.0	102.6	111.7	127	202.6	8.1	147.1	157.3	346.4	1 333.7	5.5	234.2	124.8	112.3
1979 1st qtr	108.9	101.4	110.3	131	208.9	9.6	152.2	161.6	356.5	1 356.7	5.6	232.6	110.3	113.3
2nd qtr										1 304.5 p	5.4 p	255.0 p		
1978 May	110.0	103.5	108.2	127	195.7	7.7	146.8	151.9	326.2	1 384.8	5.7	205.6	120.5	113.3
Jun	111.1	104.9	108.6	142	197.2	7.4	147.0	152.7	333.0	1 378.1	5.7	213.4	121.9	111.1
Jul	111.6	105.1	111.0	111	198.1	7.8	145.8	153.8	333.2	1 370.2	5.7	211.1	125.7	114.3
Aug	112.1	106.0	111.7	142	199.4	8.0	144.2	154.8	334.7	1 373.4	5.7	211.8	124.5	111.3
Sep	110.8	104.4	109.6	144	200.2	7.8	144.8	155.7	339.2	1 360.2	5.6	222.8	124.3	119.1
Oct	108.8	101.7	110.2	133	201.1	7.8	145.7	156.6	344.5	1 349.9	5.6	231.8	125.9	110.8
Nov	109.8	102.5	110.5	126	202.5	8.1	147.3	157.1	344.5	1 331.7	5.5	234.9	122.5	113.7
Dec	111.5	103.7	113.8	121	204.2	8.4	148.3	158.3	350.1	1 319.6	5.5	235.9	126.0	112.5
1979 Jan	103.4	93.4	109.6	121	207.2	9.3	150.8	160.0	344.7	1 342.1	5.6	235.7	113.0	107.1
Feb	110.7	103.5	110.4	117	208.9	9.6	152.2	161.7	355.6	1 366.5	5.7	228.9	100.7	117.0
Mar	112.5	107.3	110.8	156	210.6	9.8	153.5	163.2	369.3	1 361.5	5.6	233.1	117.3	115.7
Apr	115.0 p	106.8 p	115.4	158	214.2	10.1	158.3 p	165.3 p	367.9 p	1 327.4	5.5	245.3	128.4	127.2
May			113.5	172	215.9	10.3	160.7 p	167.2 p		1 306.4	5.4	257.3	133.6	127.8
Jun										1 279.6 p	5.3 p	262.4 p		
% change latest 3 months														
on prev. 3 months	+4.1	+6.0	+1.3	+35.4	+3.3		+4.7	+3.3	+5.1	−3.9		+9.6	+11½	+10
on a year earlier	4.0	+2.6	+5.2	±20.9	+10.1		+8.9	+9.5	+15.0	−6.1		+23.6	+4	+11

p Provisional. e Estimate. [1] Including figures published on or before 2 July 1979. [2] Average of available months.

Inquiries: 01-215 3453

Economic indicators of the industrial countries

The tables have been prepared for the convenience of users who do not have access to the sources themselves. International publications (as indicated) have been used, supplemented, where available, by later reports, denoted – e. The form of presentation adopted – indicators by subject – is for convenience only, and it must not be assumed that the indicators in the same table for different countries are strictly comparable. An attempt has been made to indicate major differences of definition, but the coverage and methods of collection vary considerably; this is partly due to different administrative procedures in various countries. Fuller details may be obtained from the sources indicated and from the national publications of the countries concerned. Exchange rates are those used in the basic data sources. The group of industrial countries, taken as comprising the members of the Organisation for Economic Co-operation and Development (OECD), is western Europe, north America, Japan, Australia and New Zealand. Consumer prices apart, New Zealand is excluded from OECD totals in that insufficient information is available.

The five tables in this article are published monthly. A full set of tables with commentary appears quarterly (see *Trade and Industry*, 2 March).

Consistent with the OECD source, indices now appear on 1975 = 100.

Inquiries: 01-215 3442.

Table 1 **Industrial production** (excluding construction) seasonally adjusted

Indices 1975 = 100

	Belgium	Luxembourg r	France [2]	F.R. of Germany [4]	Ireland	Italy	Netherlands	United Kingdom r	EEC [1] [3]	Canada	United States	Japan	OECD [3]
Weights in total	1.6	0.1	7.9	13.5	0.2	4.9	1.8	5.6	35.6	3.7	34.9	15.5	100
1974	111		108	106.0	107	109.7	105	105.0	107	105.7	109.8	111.7	109
1975	100	100.0	100	100.0	100	100.0	100	100.0	100	100.0	100.0	100.0	100
1976	109	106.3	109	107.3	109	111.6	106	102.7	108	105.1	110.2	111.0	109
1977	109	106.9	110	110.5	118	111.6	107	107.4	110	109.3	116.4	115.6	113
1978	111	108.5	113	113.0	129	113.8	108	110.8	112	115.2	123.3	122.7	118
1977 1st quarter	110	106.6	112	111	114	118.7	107	107.5	111	108.5	113.4	115.3	112
2nd	108	108.0	111	110	117	112.8	108	107.4	110	108.6	116.3	115.2	113
3rd	109	105.5	110	110	118	112.5	105	107.9	110	109.4	117.5	115.1	113
4th	108	107.3	109	111	123	110.5	107	106.9	110	110.9	118.3	116.6	114
1978 1st quarter	109	107.0	110	111	127	114.5	107	108.3	111	112.3	118.5	120.0	115
2nd	108	105.7	114	111	129	113.6	106	111.5	112	113.7	122.2	122.1	117
3rd	111	110.7	112	114	127	114.0	108	112.4	113	115.8	124.8	122.8	118
4th	116	111.3	115	115	132	120.6	111	110.9	115	118.8	127.1	125.4	121
1979 1st qtr	117 e		116	115		122.2	110	111.8	114	121.3	128.4	128.1	122
1977 November	108	110.5	111	110		111.9	105	106.4	110	110.8	118.3	117.0	114
December	109	107.4	108	113		108.7	109	107.7	110	111.3	118.6	117.9	114
1978 January	108	109.2	111	114		113.2	107	108.2	112	110.6	117.8	119.1	115
February	109	107.2	111	110		115.1	107	108.6	111	112.8	118.2	119.2	114
March	109	104.5	113	110		115.0	107	108.1	111	113.5	119.6	121.7	116
April	109	109.8	117	111		113.0	108	111.9	112	113.9	121.6	121.8	117
May	110	103.2	114	110		113.3	103	110.6	111	112.9	122.2	122.2	117
June	107	104.2	112	112		114.5	108	111.9	112	114.4	123.0	122.3	117
July	111	114.1	113	114		113.7	110	112.6	113	114.9	124.0	121.2	118
August	109	108.3	113	113		113.2	105	113.2	113	114.2	124.9	123.1	118
September	112	109.8	115	115		115.2	108	111.5	114	118.3	125.5	124.1	120
October	114	110.7	115	115		120.9	108	109.3	115	117.9	126.2	123.9	120
November	112	109.1	115	115		121.3	109	110.6	115	118.6	127.0	125.3	121
December	122	114.1	116	115		119.5	114	112.6	116	120.0	128.1	127.1	122
1979 January	114	104.4	115	115		119.4	110	105.0	114	120.7	128.1	127.4	121
February	117	113.5	115	114		125.2	109	114.0	116 e	121.4	128.2	128.5	122
March	119 e		117	115		122.2	109	116.3	117 e	121.8	129.0	128.3	123
April			115 e			123.5 e		116.4			127.8		
May											129.5 e		
% change latest three months On previous three months	0.6	0.7	0.3	n.a.	3.9	3.0	−0.9	5.6	0.3	2.1	0.5	2.1	0.8
On a year earlier	7.4	2.5	1.8	n.a.	7.3	8.1	2.2	5.5	3.9	8.0	6.3	6.7	6.1

[1] Excluding Denmark. [2] Yearly and quarterly data have more complete coverage than monthly data. [3] The monthly figures for OECD and EEC are weighted by Department of Trade consistent with the quarterly figures published by OECD. [4] From November 1978, data not comparable with those for previous periods. e Estimated. r Revised.
Source: United Kingdom, Central Statistical Office; all others 'OECD Main Economic Indicators'.

Time Rates of Wages and Hours of Work

A volume of tables giving particulars of the minimum, or standard, time rates of wages for the more important industries and occupations, and of the normal weekly hours for which these rates are payable. The details given relate to the position as at April 1, 1977, but any later changes known to have come into operation are shown.

£6.25 (by post £6.57)

Government publications can be bought from the Government Bookshops in London (post orders to PO Box 569, SE1 9NH). Edinburgh, Cardiff, Belfast, Manchester, Birmingham and Bristol, or through booksellers.

HMSO BOOKS

Table 3 **Unemployment** seasonally adjusted*

Numbers thousands

	Belgium [3]	Denmark [2,8]	France [1,7]	F.R. of Germany [1]	Ireland [3]	Italy [4,6]	Nether-lands [1]	United Kingdom [1,8]	Canada [4]	United States [4]	Japan [4]
1974	105	50	498	583	48	1 113	135	600 [6]	514	5 076	740
1975	177	*124*	840	1 074	75	1 230	195	929	690	7 830	1 000
1976	229	*126*	933	1 060	84	1 426	211	1 269	727	7 288	1 080
1977	264	164	*1 073*	1 030	82	1 545	204	1 378	850	6 856	1 100
1978	282	190	*1 167*	993	75 e	1 571	206	1 376	911	6 047	1 240
1977 1st quarter	249	147	997	1 014	82	1 459	204	1 333	816	7 178	1 052
2nd	261	156	1 067	1 042	83	1 432	202	1 353	832	6 949	1 099
3rd	272	163	1 134	1 041	82	1 692	203	1 403	863	6 708	1 131
4th	276	172	*1 084*	1 023	80	1 598	205	1 422	895	6 492	1 124
1978 1st quarter	279	183	*1 061*	1 011	78	1 520	205	1 416	901	6 179	1 173
2nd	285	184	*1 139*	1 000	76	1 455	202	1 389	922	6 028	1 251
3rd	284	186	1 234	995	74	1 658	206	1 368	921	6 027	1 288
4th	281	189	1 224	952	71 e	1 651	209	1 334	900	5 908	1 251
1979 1st quarter	287	176	1 285	920		1 632	211	1 357	882	5 878	1 118
2nd								1 305			
1977 November	278	172	*1 081*	1 029	81		207	1 424	896	6 635	1 139
December	275	176	*1 070*	1 015	79		205	1 421	904	6 187	1 149
1978 January	278	179	*1 040*	996	79		206	1 422	886	6 292	1 141
February	278	181	*1 057*	1 012	78		205	1 414	894	6 092	1 176
March	281	189	*1 086*	1 024	77		204	1 411	924	6 153	1 200
April	283	185	*1 105*	998	77		203	1 403	916	6 063	1 212
May	287	184	1 135	1 007	76		202	1 385	927	6 156	1 254
June	286	183	1 176	996	74		202	1 378	923	5 864	1 288
July	283	184	1 225	1 000	74		204	1 370	908	6 176	1 265
August	285	185	1 251	1 000	74		206	1 373	922	5 940	1 282
September	283	187	1 226	984	73		208	1 360	933	5 964	1 317
October	282	188	1 219	972	72		209	1 350	899	5 836	1 275
November	282	188	1 215	951	72 e		209	1 332	906	5 877	1 280
December	279	190	1 238	933	70 e		210	1 320	895	6 012	1 200
1979 January	282	180	1 256	954	70 e		210	1 342	897	5 883	1 152
February	288	174	1 285	922			213	1 366	872	5 881	1 049
March	291	175	1 313	883			211	1 362	876	5 871	1 152
April	293		1 339	874			206	1 327	880	5 937	1 224
May	295 e		1 376				209 e	1 307	853	5 929	
June								1 280			
Rate % latest month	10.9 e	6.7	7.3	3.8	10.0 e	7.6	5.0 e	5.3	7.7	5.8	2.2
% change latest three months											
On previous three months	3.5	−6.5	6.6	−5.6	−3.2	−1.2	−1.1	−3.8	−2.1	−0.2	−5.7
On a year earlier	3.3	−3.6	n.a.	−11.7	−11.3	7.4	2.8	−6.0	−5.7	−3.5	−4.5

*Unemployment data are defined and collected on different bases in different countries. The following notes indicate main variations preventing direct international comparison. [1] Numbers registered at employment offices. Rates are calculated as percentages of total employees. [2] Excluding school leavers. Year 1974 estimated in the absence of one month's figures. [3] Insured unemployed. Rates are calculated as percentages of total insured population. [4] Labour force sample survey. Rates are calculated as percentages of total labour force. The quarterly data for Italy relate to January, April, July and October. [5] From 1977, including unemployed insured for loss of part time jobs. From 1978, including partially unemployed. [6] Not seasonally adjusted. [7] Data from October 1977 to April 1978 are affected by administrative changes which tend to reduce the figures. [8] Numbers registered at employment offices. As from January 1979, rates are calculated as a percentage of total labour force. e Estimated. n.a. Not available. r Revised. Source: 'OECD Main Economic Indicators' and *Department of Employment Gazette*.

Table 5 **Consumer prices** All goods and services

Indices 1975 = 100

	Belgium	Luxem-bourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether-lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1974	88.7	90.3	91.3	89.5	94.4	82.7	85.5	90.7	80.5	88.8	90.3	91.6	89.4	89.9
1975	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1976	109.2	109.8	109.0	108.6	104.5	118.0	116.8	108.8	116.5	110.1	107.5	105.8	109.3	108.5
1977	116.9	117.2	121.1	119.9	108.6	134.1	138.3	115.8	135.0	121.6	116.1	112.6	118.1	118.5
1978	122.1	120.8	133.2	130.8	111.4	144.3	155.1	120.5	146.2	130.4	126.5	121.2	122.6	128.0
1977 1st quarter	114.3	115.3	115.3	114.9	107.3	129.1	131.6	113.0	129.2	117.5	112.3	109.7	115.3	114.6
2nd	116.2	117.1	119.0	118.5	108.8	134.0	136.6	115.8	134.9	120.9	114.9	112.1	118.4	117.7
3rd	117.9	117.9	122.0	121.3	109.0	135.4	140.1	116.6	137.0	122.8	117.4	113.7	118.8	119.7
4th	119.3	118.4	128.3	123.6	109.3	137.8	144.8	117.8	139.0	124.8	119.9	115.0	119.8	121.8
1978 1st quarter	120.8	119.2	129.9	125.5	110.7	139.8	148.6	118.2	141.4	126.8	122.1	116.9	120.3	123.8
2nd	121.3	120.5	132.0	129.1	111.7	142.2	153.1	119.9	145.3	129.5	125.1	120.0	122.7	126.9
3rd	122.6	121.2	133.6	132.5	111.7	146.6	156.8	121.5	147.8	131.6	128.3	122.8	123.6	129.5
4th	123.9	122.3	137.5	135.3	111.8	148.7	161.5	122.6	150.3	133.7	130.3	125.3	123.9	132.0
1979 1st qtr	125.4	123.9	138.8	138.3	114.1	154.9	167.7	123.1	155.0	136.9	133.2	128.4	123.5	135.2
1978 January	120.3	119.0	129.2	124.5	110.2		146.9	117.5	140.6	125.9	121.2	116.1	119.6	123.0
February	120.8	119.2	129.8	125.5	110.8	139.8	148.4	118.0	141.4	126.8	121.9	116.9	120.1	123.8
March	121.1	119.6	130.7	126.6	111.1		150.3	119.0	142.3	127.7	123.3	117.7	121.2	124.7
April	121.2	120.2	131.2	127.9	111.4		151.8	119.8	144.4	128.8	123.6	118.8	122.5	126.0
May	121.4	120.4	132.3	129.2	111.7	142.2	153.2	120.0	145.2	129.6	125.3	119.9	123.2	127.0
June	121.4	120.8	132.6	130.2	112.0		154.5	119.9	146.3	130.3	126.4	121.2	122.5	127.8
July	122.1	121.0	132.9	131.7	112.0		155.4	120.8	147.0	131.0	128.3	122.0	123.0	128.8
August	122.6	121.1	133.5	132.5	111.7	146.6	156.2	121.4	147.9	131.5	128.4	122.7	123.1	129.3
September	123.1	121.3	134.4	133.4	111.4		158.7	122.3	148.5	132.2	128.2	123.6	124.6	130.3
October	123.4	122.0	136.9	134.6	111.4		160.1	122.6	149.2	132.9	129.5	124.6	124.8	131.3
November	123.8	122.4	137.7	135.3	111.7	148.7	161.8	122.6	150.2	133.7	130.5	125.3	123.5	131.8
December	124.4	122.4	137.8	136.0	112.2		162.6	122.5	151.5	134.4	130.9	125.9	123.3	132.9
1979 January	125.1	123.4	137.9	137.2	113.4		165.3	122.2	153.7	135.8	131.9	127.0	123.4	134.2
February	125.5	124.0	138.6	138.2	114.0	154.9	167.8	122.9	155.0	137.0	133.1	128.5	123.0	135.2
March	125.6	124.2	140.0	139.4	114.8		170.1	124.3	156.2	138.0	134.7	129.7	124.0	136.3
April	125.9	124.5	140.4	140.8	115.4		172.2	124.9	158.9	139.5	135.7	131.2	125.7	138.0
May	126.3 e	125.2 e		142.2 e	115.8 e			124.9 e	160.2			132.6 e		
Percentage change														
Latest month on same month a year earlier	4.0	4.0	7.0	10.1	3.7	10.8	13.5	4.1	10.3	8.3	9.8	10.6	2.6	9.5
Latest three months on previous three months	0.7	1.1	1.4	2.7	1.9	4.2	4.2	1.8	3.3	2.6	2.6	3.2	0.7	2.7
Latest three months on a year earlier	3.9	3.8	7.0	10.1	3.5	10.8	13.2	4.3	10.0	8.1	9.4	10.4	2.4	9.3

e Estimated.
Source: 'OECD Main Economic Indicators'.

Table 8 **Exports** (fob) Special trade [1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany [2]	Ireland [2]	Italy	Nether-lands	United Kingdom [2]	EEC	Canada	United States [2] [3]	Japan [2]	OECD
1974	28 260	7 716	45 900	89 160	2 628	30 288	32 436	38 827	275 100	32 784	98 508	55 536	532 932
1975	28 812	8 712	52 212	90 024	3 216	34 824	34 440	44 270	295 992	32 304	107 652	55 752	567 804
1976	32 844	9 108	55 812	102 036	3 312	36 924	38 748	46 542	325 044	38 628	114 996	67 224	630 492
1977	37 488	10 068	63 516	117 936	4 392	45 036	43 680	57 526	379 620	41 556	120 168	80 496	715 104
1978 [4]	44 808	11 844	76 464	142 092	5 688	55 956	50 016	71 729	458 556	46 152	143 664	97 548	857 256
1977 1st quarter	9 010	2 526	15 125	27 822	956	10 557	10 530	12 977	89 354	10 250	30 003	19 133	171 027
2nd	9 210	2 390	15 341	28 863	1 017	11 233	10 770	14 292	92 944	10 178	30 270	19 631	175 767
3rd	9 277	2 525	16 236	29 718	1 172	11 098	11 248	14 950	96 370	10 396	30 558	20 309	180 839
4th	9 755	2 645	17 132	31 569	1 250	12 037	11 325	15 307	101 345	10 496	29 451	21 440	187 358
1978 1st quarter [4]	10 262	2 710	17 594	33 054	1 351	11 772	12 089	17 122	105 610	10 640	31 479	23 382	196 899
2nd	10 365	2 885	18 264	34 089	1 332	13 224	12 054	16 715	108 955	11 440	35 364	23 770	207 156
3rd	11 217	3 026	19 955	35 943	1 444	12 991	12 897	18 440	115 873	11 524	37 584	25 094	218 264
4th	12 594	3 288	21 204	39 176	1 568	17 704	13 398	19 500	128 850	12 165	39 427	25 520	236 776
1979 1st quarter		3 382								12 821			
1977 August	2 993	850	5 462	(9 861)	396	3 881	3 849	4 823	32 335	3 495	(9 479)	6 730	59 838
September	3 290	852	5 586	(10 199)	380	3 596	3 691	5 106	32 645	3 360	(10 884)	6 610	61 249
October	3 167	849	5 645	(10 369)	388	3 620	3 663	5 017	32 704	3 609	(9 174)	6 960	60 181
November	3 200	872	5 539	(10 197)	413	3 924	3 744	4 898	33 129	3 040	(9 093)	7 235	60 721
December	3 388	924	5 948	(11 482)	449	4 493	3 918	5 392	35 512	3 847	(11 218)	7 245	66 456
1978 January [4]	3 520	887	5 680	(10 942)	475	3 704	4 008	5 369	34 490	3 293	(10 150 e)	7 607	64 058
February	3 282	933	5 747	(10 772)	423	4 062	4 032	6 068	35 210	3 792	(10 036 e)	7 971	65 823
March	3 460	890	6 167	(10 680)	453	4 006	4 049	5 685	35 910	3 555	(10 897 e)	7 804	67 018
April	3 549	947	6 227	(12 108)	455	4 657	3 962	5 607	36 851	4 299	(11 975)	7 802	69 736
May	3 397	933	5 848	(10 354)	422	4 286	4 032	5 528	34 885	3 570	(11 720)	7 961	67 004
June	3 419	1 005	6 189	(12 293)	455	4 281	4 060	5 580	37 219	3 571	(12 112)	8 007	70 416
July	3 650	902	6 537	(10 664)	457	4 122	4 164	5 990	36 591	3 619	(12 054)	8 026	68 760
August	3 740	1 027	6 453	12 169	477	4 318	4 235	6 203	38 578	3 646	12 390	8 354	72 606
September	3 827	1 097	6 965	12 910	510	4 551	4 498	6 247	40 704	4 259	13 412	8 714	76 898
October	4 281	1 110	7 176	13 346	499	5 281	4 583	6 526	42 953	3 819	12 774	8 382	78 171
November	4 348	1 050	7 208	13 172	545	5 326	4 405	6 427	43 127	4 189	13 134	8 787	79 541
December	3 965	1 128	6 820	12 658	524	7 097	4 410	6 547	42 770	4 157	13 519	8 351	79 064
1979 January	3 925	1 098	7 153	13 178	469	4 679	4 605	6 037	41 010	4 201	13 402	8 005	
February		1 026	7 413	13 160	563	6 492	4 800			3 871	13 947	8 318	
March		1 258								4 749			

[1] See notes to table 9.

Source: United Kingdom. Department of Trade; all others: 'OECD Series "A" '.

Table 9 **Imports** (cif) Special trade [1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany [2]	Ireland [2]	Italy	Nether-lands	United Kingdom [2]	EEC	Canada [2]	United States [2] [3]	Japan	OECD
1974	29 700	9 852	52 824	68 976	3 816	40 968	33 204	54 344	293 568	32 292	100 968	62 112	583 080
1975	30 708	10 332	54 240	74 208	3 804	38 364	35 148	53 618	300 048	33 960	96 936	57 864	587 376
1976	35 352	12 420	64 392	87 780	4 200	43 368	39 948	56 269	343 428	37 956	121 788	64 800	676 308
1977	40 248	13 260	70 488	100 704	5 388	47 556	45 600	63 740	386 940	39 540	147 852	70 812	765 936
1978 [4]	48 360	14 760	81 684	120 672	7 104	56 364	52 872	78 652	460 404	43 560	173 292	79 344	887 100
1977 1st quarter	9 379	3 285	17 317	23 985	1 243	11 910	11 224	15 322	93 627	9 874	35 460	17 625	185 655
2nd	9 564	3 282	17 338	24 240	1 286	12 074	11 280	16 429	95 262	10 081	37 788	17 610	190 907
3rd	9 487	3 372	17 854	25 836	1 417	11 344	11 581	15 779	96 740	9 850	37 284	17 698	192 793
4th	10 125	3 291	18 236	26 883	1 474	12 143	11 693	16 210	100 025	9 871	37 758	17 928	196 200
1978 1st quarter [4]	10 992	3 467	19 144	28 464	1 524	11 953	12 419	18 977	106 689	9 660	40 809	18 429	206 318
2nd	10 851	3 500	19 567	28 548	1 748	12 741	12 524	18 754	107 813	11 148	43 236	18 999	212 913
3rd	11 869	3 773	20 901	30 513	1 937	13 854	13 639	20 239	116 745	10 914	44 175	20 172	224 439
4th	12 983	4 123	22 578	33 626	1 948	17 332	14 751	20 681	128 591	11 843	46 123	21 891	244 715
1979 1st quarter		4 078								12 608			
1977 August	3 390	1 125	6 068	(8 393)	461	3 883	3 942	4 936	32 517	3 291	(12 167)	6 013	64 608
September	3 199	1 148	5 957	(8 594)	488	3 703	3 796	5 369	32 289	3 257	(12 652)	5 844	64 248
October	3 255	1 092	5 896	(8 557)	486	4 023	3 752	5 337	32 467	3 359	(11 954)	5 850	64 405
November	3 359	1 094	6 218	(8 773)	479	3 882	3 926	4 998	33 046	2 997	(11 581)	6 000	63 824
December	3 511	1 105	6 122	(10 105)	509	4 238	4 015	5 875	34 512	3 515	(14 105)	6 078	67 971
1978 January [4]	3 626	1 150	6 397	(9 824)	537	3 807	4 117	6 257	35 266	3 059	(12 582)	6 176	67 254
February	3 673	1 148	6 180	(9 252)	515	4 071	4 145	6 163	35 049	3 691	(14 848)	6 277	70 243
March	3 693	1 169	6 567	(8 978)	472	4 075	4 157	6 557	36 374	2 910	(13 348)	5 976	68 821
April	3 535	1 143	6 530	(10 104)	546	4 326	4 253	5 666	35 309	4 253	(15 328)	6 584	71 768
May	3 664	1 179	6 529	(9 050)	597	4 502	4 233	6 562	36 359	3 430	(14 165)	6 655	71 020
June	3 652	1 178	6 508	(9 823)	605	3 913	4 038	6 526	36 145	3 465	(13 707)	5 760	70 125
July	3 753	1 175	6 729	(9 686)	604	5 133	4 480	6 522	38 074	3 707	(15 643)	6 384	73 624
August	4 096	1 291	6 977	10 113	673	4 233	4 534	6 698	38 658	3 440	13 778	6 706	73 207
September	4 020	1 307	7 195	10 664	660	4 488	4 625	7 019	40 013	3 767	15 358	7 082	77 608
October	4 379	1 385	7 548	11 237	681	4 844	4 918	6 861	42 028	3 843	15 402	6 911	80 798
November	4 334	1 351	7 522	11 264	695	5 384	5 039	6 992	43 422	3 836	14 931	7 412	81 616
December	4 270	1 387	7 508	11 125	572	7 104	4 794	6 828	43 141	4 164	15 790	7 568	82 301
1979 January	3 965	1 300	7 730	11 609	669	5 062	4 601	6 597	41 425	4 104	14 974	7 526	
February		1 336	8 064	11 558	630	5 890	4 913			3 956	15 354	8 018	
March		1 442								4 548			

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] fob. [4] In these tables, from January 1978, the trade of Ireland, United Kingdom, United States, Italy and Japan are classified according to SITC Rev 2. The changes are described in an article in *Trade and Industry* 10 February 1978, which also gives for the UK an indication of the magnitude of the change. It is thought that other countries have also adopted this classification from the beginning of 1978, but the extent of the discontinuity has not been ascertained. Percentage changes may be misleading and have therefore been omitted. [5] The OECD has revised the seasonally adjusted figures. It has been possible to include only the published revisions at this stage, therefore figures in parenthesis are still on the old basis. e Estimate.

Source: United Kingdom, Department of Trade; all others: 'OECD Series "A" '.

Retail sales in May: final estimate

Volume

The final seasonally adjusted index of the volume of retail sales in May is 113.5, the same as the provisional estimate.

There was a fallback in the sales of non-food shops from April when their sales appear to have increased to make up for trade lost in the first quarter. Despite this, sales of both food and non-food shops in May were significantly higher than their level during the fourth quarter of last year.

Because trade in the early months of this year was affected by the lorry drivers' dispute and very bad weather the period chosen for comparison is the five months January to May and the fourth quarter of last year. On this basis of comparison the volume of retail sales in the first five months of this year was little changed from the level of the fourth quarter of last year.

The volume of sales by durable goods shops in the first five months of 1979 was 2 per cent higher than in the previous three months. Sales by clothing and footwear shops and by 'other non-food shops', which include department stores and mail order businesses, both fell by 1 per cent. Sales by food shops rose by 1 per cent between these periods.

Value

Based on non-seasonally adjusted data, the value of total retail sales in May was 14 per cent higher than in May 1978. In the first five months of 1979, the average value of sales was 13 per cent higher than in the corresponding period of 1978.

Notes

The indices for all shops, food shops, and total non-food shops are shown to the first decimal place to help interpretation, but should not be regarded as necessarily accurate to the final digit. The best indication of the recent trend is normally obtained by comparing the average index for the latest three months with the average for the immediately preceding three months, but month-to-month fluctuations may sometimes make it preferable to average two months or four months.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The monthly periods consist of four weeks except those marked ' which are of five weeks. The May 1979 sales period was the four weeks from 29 April 1979 to 26 May 1979. The corresponding period in 1978 was the four weeks from 30 April 1978 to 27 May 1978.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

Within the total, sales are analysed by 'kinds of business'; ie the statistics are of sales by particular kinds of shop rather than of sales of particular commodities. For example, while sales by shops classified as food shops are mainly of food, many of them also sell other goods. Similarly, some food is sold by shops classified to other kinds of business.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays and adjustments to make allowance for the inclusion of an extra week in the January 1975 trading period. No adjustments are made to the non-seasonally adjusted data.

The article giving the provisional estimate of the seasonally adjusted index of the volume of retail sales for June and the increase in value of sales compared with a year earlier is due to be published later this month.

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Table 1 **Volume of retail sales seasonally adjusted**

Index numbers of sales per week (average 1971 prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	105.3	101.6	107.9	104	113	108
1973	110.3	101.6	116.6	108	127	117
1974	109.0	102.4	113.8	106	122	115
1975	106.7	100.0	111.5	106	119	111
1976	106.5	98.7	112.1	106	122	111
1977	103.6	94.8	110.0	105	119	109
1978	109.2	98.0	117.4	114	130	114
1977						
1st qtr	103.3	94.9	109.4	105	115	109
2nd	102.4	94.4	108.1	101	118	108
3rd	104.2	94.3	111.3	107	121	110
4th	104.7	95.6	111.3	109	122	109
1978						
1st qtr	106.4	96.6	113.6	111	124	111
2nd	107.9	97.8	115.3	111	129	113
3rd	110.7	98.1	119.9	117	134	116
4th	111.7	99.4	120.6	119	134	116
1979						
1st qr	110.3	99.9	117.8	116	131	114
1978						
May	108.2	98.3	115.4	113	127	112
June '	108.6	98.3	116.0	111	130	113
July	111.0	98.2	120.4	116	137	116
August	111.7	97.8	121.8	121	133	118
September '	109.6	98.2	118.0	115	133	114
October	110.2	98.3	118.8	115	132	116
November	110.5	98.6	119.2	115	132	116
December'	113.8	100.9	123.2	126	137	117
1979						
January	109.6	103.6	113.9	109	127	111
February	110.4	97.0	120.2	117	137	116
March'	110.8	99.3	119.1	120	129	115
April	115.4	101.6	125.4	124	144	119
May	113.5	101.5	122.3	116	144	117
1978-1979						
December-February	111.5	100.5	119.4	118	134	115
1979						
March-May	113.0	100.7	122.0	120	139	117
Percentage increase	1.3	0.2	2.2	2	4	2

' Five-week period.
[2] Including department stores and mail-order businesses.

Table 2 **Value of retail sales seasonally adjusted**

Index numbers of value of sales per week (current prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	112.0	109.0	114.2	112	118	114
1973	126.9	123.0	129.8	128	136	128
1974	146.7	144.9	148.1	148	144	149
1975	174.4	175.0	174.0	171	168	178
1976	200.1	204.8	196.7	189	187	204
1977	228.0	234.7	223.1	216	206	233
1978	260.1	261.8	258.8	255	244	266
1977						
1st qtr	216.7	224.2	211.2	205	192	221
2nd	222.0	230.4	215.9	204	201	227
3rd	233.7	238.8	230.0	223	213	240
4th	239.6	245.5	235.2	231	220	243
1978						
1st qtr	246.4	249.8	243.8	239	228	252
2nd	254.4	258.4	251.4	244	241	259
3rd	266.6	266.0	267.1	264	253	274
4th	273.0	273.1	273.0	272	255	280
1979						
1st qr	276.4	282.8	271.8	269	253	280
1978						
May	255.2	259.9	251.7	248	237	259
June '	257.4	261.9	254.1	246	244	262
July	265.0	264.5	265.3	260	255	272
August	269.2	265.7	271.9	273	252	279
September '	265.9	267.4	264.8	260	252	272
October	267.9	268.1	267.8	262	250	277
November	269.7	270.8	268.9	262	251	279
December'	279.8	278.9	280.4	289	262	283
1979						
January	273.1	291.3	259.9	254	241	270
February	275.4	274.6	275.9	271	262	283
March '	279.8	282.5	277.9	280	256	285
April	290.6	287.7	292.6	292	280	298
May	289.2	291.5	287.6	277	285	294
1978-1979						
December-February	276.4	281.4	272.7	273	255	279
1979						
March-May	286.0	286.9	285.4	283	272	291
Percentage increase	3.5	2.0	4.7	4	7	4

' Five-week period.
[2] Including department stores and mail-order businesses.

Hire purchase and other credit business in May

Finance houses, other consumer credit grantors and retailers advanced £624 million of new credit in May, of which £388 million was lending by grantors other than retailers (table 1). This was an increase of £42 million on the April figure, reflecting pre-budget spending, especially on motor vehicles. These figures allow for seasonal factors, as do all figures in this article unless otherwise stated.

Total advances in the latest three months, March to May, were 10 per cent higher than in the previous three months. Lending by finance houses and other consumer credit grantors increased by 15 per cent between the two three-month periods. Lending by retailers increased by 4 per cent.

Finance houses and other consumer credit grantors advanced £388 million of new fixed-sum credit in May. Within this total, £227 million was advanced under regulated consumer credit agreements and £161 million under other credit agreements (table 2). Lending to individuals under regulated agreements increased by 19 per cent during the latest three-month period. Lending under other credit agreements (mainly lending to companies) increased by 10 per cent.

The average weekly value of credit sales by retailers in May was higher than in recent months (table 3). In the latest three months, March to May, average credit sales were 5 per cent higher than in the previous three months. Within this total, sales by durable goods shops increased by 11 per cent, sales by department stores decreased by 8 per cent and sales by other credit retailers (mainly mail-order business) increased by 4 per cent.

The debt outstanding to finance houses, other consumer credit grantors and retailers increased by £182 million in May, bringing the total increase in the three months March to May to £410 million, compared to £324 million in December to February (table 1). Amounts outstanding to finance houses and other consumer credit grantors increased by £354 million and those to retailers by £56 million during the latest three-month period; 62 per cent of the increase in debt outstanding to finance houses and other consumer credit grantors related to regulated fixed-sum credit agreement (table 2).

At the end of May, the total amount outstanding to finance houses, other consumer credit grantors and retailers was £6,753 million (not seasonally adjusted), 26 per cent more than a year earlier (table 1). Within this total, £5,062 million was outstanding to finance houses and other consumer credit grantors on fixed-sum credit agreements and £252 million on running-account agreements (table 2). £1,439 million was outstanding to retailers.

Inquiries: Department of Trade, Economics and Statistics Division 6a, Room 349, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

Table 1 **Hire purchase and other credit business, seasonally adjusted** [1] £ million

	Total		Finance houses and other consumer credit grantors [2]		Retailers [3]	
	New credit extended	Change in debt	New fixed sum credit extended	Change in fixed sum debt	New credit extended	Change in debt
1976	3 688		1 835		1 853	141
1977	4 644	1 006	2 552	881	2 092	125
1978	5 998	1 561	3 563	1 370	2 435	191
1977						
2nd qtr	1 102	224	596	205	506	19
3rd	1 203	267	657	228	546	39
4th	1 278	274	736	262	542	12
1978						
1st qtr	1 374	403	809	337	565	66
2nd	1 506	443	901	383	605	60
3rd	1 542	368	895	308	647	60
4th	1 576	347	958	342	618	5
1979						
1st qtr	1 586	345	934	258	652	87
1978						
July	490	96	270	79	220	17
August	536	155	321	128	215	27
September	516	117	304	101	212	16
October	508	112	306	101	202	11
November	561	157	344	147	217	10
December	507	78	308	94	199	−16
1979						
January	525	119	300	73	225	46
February	531	127	311	98	220	29
March	530	99 r	323	87	207	12 r
April	572	129	346	120	226	9
May	624	182	388	147	236	35
1978						
Dec-Feb	1 563	324	919	265	644	59
1979						
Mar-May	1 726	410	1 057	354	669	56
Percentage increase	*10*		*15*		*4*	

[1] Excluding charges. [2] Direct business only: ie excluding agreements block discounted with finance houses by retailers. [3] Durable goods shops, department stores and 'other credit retailers'. For further definitions see footnotes to table 2.

Table 3 **Retailers' credit sales, seasonally adjusted**

Index numbers of value of sales per week (current prices) 1971 = 100

(HP and other credit sales in 1971 £ million[3])	Total [1] (1130)	Durable goods shops (370)	Department stores (139)	Other credit retailers [2] (621)
1976	190	136	162	229
1977	217	142	171	272
1978	257	169	204	320
1977				
2nd qtr	210	136	153	266
3rd	227	148	179	284
4th	227	148	184	283
1978				
1st qtr	237	167	183	291
2nd	254	171	199	315
3rd	272	174	219	342
4th	264	166	214	334
1979				
1st qtr	275	177	219	346
1978				
July	275	178	231	343
August	271	174	205	344
September [4]	270	170	221	340
October	258	162	205	327
November	274	166	227	349
December [4]	260	168	211	326
1979				
January	281	181	229	352
February	277	168	226	353
March [4]	268	179	205	335
April	291	202	195	364
May	298	194	212	380
1978				
Dec-Feb av.	272	173	221	343
1979				
Mar-May av.	284	191	204	358
Percentage Increase	*5*	*11*	*−8*	*4*

[1] Durable good shops, department stores (including co-operative societies) and 'other credit retailers'. [2] General stores (other than department stores) and general mail-order houses. [3] Excluding sales against checks issued by other organisations. [4] The monthly periods for retailers consists of four weeks except those marked [4] which are of five weeks. The period covered by May 1979 sales was the four weeks from 29 April 1979 to 26 May 1979. The corresponding period in 1978 was from 30 April 1978 to 27 May 1978.

Table 2 **Finance houses and other consumer credit grantors' business** [1] £ million

	Seasonally adjusted				Unadjusted	
	Regulated fixed sum credit agreements [2]		Other fixed sum credit agreements [3]		Total debt outstanding at end of period	
	New credit extended [4]	Change in debt	New credit extended [4]	Change in debt	Fixed-sum agreements [4]	Running-account agreements [4]
1976					2 601	163
1977					3 391	183
1978	2 138	924	1 425	446	4 574	230
1977						
2nd qtr	368	146	228	59	2 957	170
3rd	403	156	254	72	3 223	175
4th	445	175	291	87	3 391	183
1978						
1st qtr	494	228	315	109	3 654	191
2nd	548	262	353	121	4 062	198
3rd	543	222	352	86	4 367	188
4th	553	212	405	130	4 574	230
1979						
1st qtr	542	146	392	112	4 764	237
1978						
July	163	63	107	16	4 136	203
August	193	92	128	36	4 281	198
September	187	67	117	34	4 367	188
October	177	65	129	36	4 483	199
November	192	84	152	63	4 574	206
December	184	63	124	31	4 574	230
1979						
January	163	31	137	42	4 585	234
February	181	52	130	46	4 655	240
March	198	63	125	24	4 764	237
April	203	69	143	51	4 898	238
May	227	86	161	61	5 062	252
1978						
Dec-Feb	528	146	391	119	4 655	240
1979						
Mar-May	628	218	429	136	5 062	252
Percentage increase	*19*		*10*			

[1] Including check traders. [2] All consumer credit agreements regulated under the Consumer Credit Act 1974. These comprise non-exempt agreements involving the provision of credit not exceeding £5,000 to individuals. [3] Including all credit agreements entered into with companies by businesses which also enter into credit agreements with individuals. All agreements entered into before 1 April 1977 are included as well as those for more than £5,000 with individuals which have been entered into since 1 April 1977. [4] Including all types of credit agreement where the total amount of credit advanced is known at the outset of the arrangement. It includes credit advanced in a hire purchase, conditional sale or credit sale agreement as well as trading checks, vouchers and cash loans of a fixed amount. [5] Including credit advanced on a revolving basis, overdrafts, non-bank credit cards. Figures for periods between end 1976 and July 1978 are estimated.

Machine tool sales and orders: March

The volume index of total sales for the metal-working machine tool industry shows a 2½ per cent increase in the trend over the December to March period (table 1). This can be attributed entirely to the home market where a 7 per cent rise in sales more than offset the 16 per cent decline in the lower-weighted export market. The seasonally adjusted figures indicate that export sales have fallen quite sharply in the first quarter of this year. However, home sales reached a high level in March in continuation of the rising trend recorded since October 1977.

Downward movements in both home and export markets have resulted in a fairly sharp fall in the trend of total new orders over the three months to March. Nevertheless, a closer look at the figures for individual markets reveals that in both cases the corresponding falls were from relatively high levels in the fourth quarter of last year. Reference to the latest monthly seasonally adjusted figures shows that recorded movements in both markets have been more than usually volatile suggesting that the situation is not yet a settled one.

Orders-on-hand for both markets rose marginally over the latest three months reflecting the slight preponderance of incoming orders over sales.

Inquiries: Department of Industry, Room 610, Dean Bradley House, 52 Horseferry Road, London SW1P 1AG, tel. 01-212 6044.

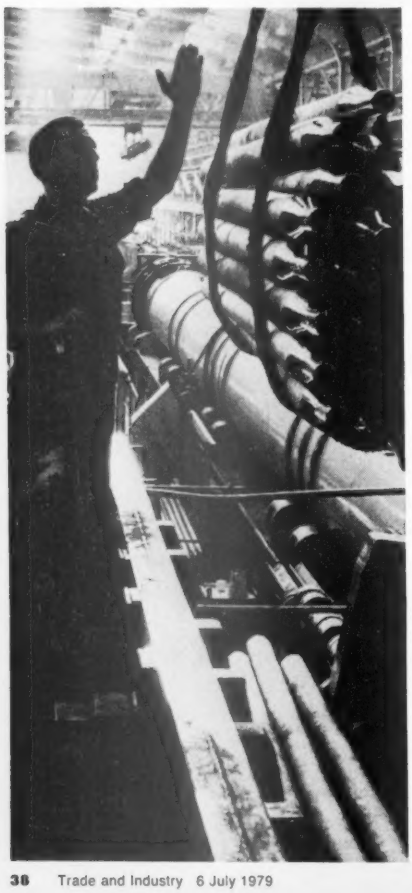

Table 1 **Trend and seasonally-adjusted volume index numbers for metal-working machine tool industry – MLH332**

	Total			Home			Export		
	Orders on hand (end of period) 1975 average = 100	New orders (a) 1975 average monthly sales = 100	Sales	Orders on hand (end of period) 1975 average = 100	New orders (a) 1975 average monthly sales = 100	Sales	Orders on hand (end of period) 1975 average = 100	New orders (a) 1975 average monthly sales = 100	Sales
Ratio of orders on hand/ average monthly sales in 1975 (b)	8.2			7.2			9.6		
Trend estimates									
1977									
January	62	87	84	63	90	93	60	82	69
February	62	87	82	63	91	90	61	80	68
March	63	87	80	64	93	88	62	76	67
April	64	86	78	65	95	87	63	71	65
May	65	85	78	67	97	86	63	67	65
June	66	85	78	68	96	85	63	66	66
July	67	85	78	70	96	85	63	68	68
August	67	85	79	71	94	84	63	70	71
September	68	84	79	73	93	83	63	70	72
October	69	84	79	74	94	82	62	69	73
November	69	85	80	76	96	83	61	67	74
December	70	86	80	78	100	84	60	63	74
1978									
January	71	85	81	80	101	86	59	59	73
February	71	82	81	82	99	86	57	56	72
March	70	79	81	83	95	86	55	54	72
April	70	76	81	83	90	86	54	54	72
May	69	75	80	83	87	86	52	57	71
June	69	76	81	83	86	87	51	61	71
July	69	81	81	83	89	88	51	68	71
August	69	87	82	84	95	88	51	75	72
September	71	94	82	86	103	88	52	79	71
October	72	97	81	89	108	89	53	80	70
November	74	97	81	91	109	90	54	77	67
December	76	94	81	93	107	91	55	72	64
1979									
January	77	89	81	95	103	93	55	67	62
February	77	85	82	96	98	95	56	63	60
March	78	79	83	96	93	98	56	58	59
Percentage change (c) (d) Dec 1978-Mar 1979	+2.5	−15.0	+2.5	+3.0	−13.5	+7.0	+2.0	−18.5	−7.5
Seasonally adjusted									
1975	74	60	100	73	64	100	75	53	100
1976	60	74	84	62	80	87	57	65	79
1977	70	87	80	78	96	86	61	72	70
1978	78	87	81	97	100	87	55	67	71
1977									
3rd qtr	67	82	79	72	90	84	62	69	70
4th qtr	70	86	80	78	97	84	61	67	73
1978									
1st qtr	70	83	81	83	101	87	55	56	73
2nd qtr	68	72	80	82	84	86	50	53	70
3rd qtr	70	90	82	86	97	88	52	78	72
4th qtr	78	104	82	97	118	90	55	81	69
1979									
1st qtr	76	77	82	93	88	96	56	59	58
1977									
July	67	87	79	70	95	88	64	74	65
August	67	80	77	71	93	83	63	59	67
September	67	80	80	72	83	81	62	76	79
October	68	86	78	74	93	80	62	75	76
November	70	85	74	76	95	77	62	70	71
December	70	86	86	78	104	95	61	57	72
1978									
January	70	84	80	80	102	85	59	55	73
February	71	92	81	82	107	87	58	67	71
March	70	74	82	83	93	88	55	44	73
April	71	80	76	85	95	78	53	55	74
May	69	67	84	83	72	93	52	60	69
June	68	68	79	82	84	86	50	44	67
July	69	94	81	84	97	86	51	88	73
August	68	76	83	83	86	91	50	59	71
September	70	99	82	86	107	88	52	87	74
October	73	100	79	89	110	90	54	85	63
November	73	87	87	89	92	88	53	78	86
December	78	124	79	97	151	91	55	80	59
1979									
January	79	80	72	97	89	91	58	65	42
February	76	64	87	95	81	97	54	36	70
March	76	87	86	93	93	101	56	76	63
1979 (AV) January-March	76	77	82	93	88	96	56	59	58
1978 (AV) October-December	78	104	82	97	118	90	55	81	69
Percentage change (c) (d)	−2.0	−26.0	—	−3.5	−25.5	+7.5	+1.0	−27.0	−16.0

(a) Net of cancellations. (b) This ratio shows the number of months' work in the order book in the base year at the then average rate of sales. (c) For orders on hand the percentage changes compare the level at the end of the latest period shown with the corresponding level for the earlier period. (d) The percentage changes have been based on the unrounded values.

Cost indices for the aerospace and radio, radar and electronic capital goods industries

April's cost indices are given below. An explanation of the compilation of the indices was given in *Trade and Industry*, 8 December 1978, page 544.

Inquiries: 01-215 3073/3514.

Definitive information on earnings for both manual and administrative, technical and clerical (ATC) workers for the aerospace industry is available only for certain months of the year – manual earnings information is available for April and October each year, ATC salaries information is available for April of each year. Revisions to series brought about as a result of ATC salaries information becoming available will be shown in the article to be published on 7 December and will affect indices from May last year up to and including those of August.

Revisions to series incorporated as a result of manual earnings information from the October survey are published in the April articles and these affect series from the preceeding November up to and including December. The results obtained from the April aerospace survey will affect indices from last November up to and including June and will be shown in the article published on 5 October.

The indices for wages and salaries for the radio, radar and electronic capital goods industry are based entirely on information relating to average earnings in the electrical engineering industry and all the manufacturing industries respectively.

The cost index tables previously D1-D5 and D7 have been redesignated sections 1 to 6 in the table.

The indices of combined costs are based on the assumption of no change in productivity.

p Provisional.

Cost indices for the aerospace and radio, radar and electronic capital goods industries (MLH 383 and 367 respectively)

1975 = 100

	1978									1979			
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
1 BOUGHT OUT FINISHED GOODS PURCHASED BY		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	151.0	152.0	154.8	155.3	155.6	157.0	159.9	160.3	162.2	162.1	165.0	168.2	170.7
Airframe sector	149.6	150.1	151.7	152.2	152.6	154.3	157.8	158.4	160.4	160.6	163.5	166.6	168.3
Aero-engine and aero-engine parts sector	152.3	153.8	157.4	158.1	158.3	159.4	161.8	162.1	163.9	163.6	166.3	169.5	172.7
Aero-engine parts sector	152.3	153.9	157.2	158.5	158.7	159.6	161.3	161.8	163.1	163.2	166.0	169.1	172.9
Aircraft components sector	149.3	149.9	151.5	152.3	152.7	154.2	157.2	157.6	159.5	159.7	162.7	165.6	167.7
2 OTHER MATERIALS PURCHASED BY													p
Aerospace industry	150.8	151.7	153.0	154.0	154.7	156.0	157.3	158.6	159.9	161.4	163.7	166.1	169.7
Airframe sector	153.1	153.7	155.2	156.1	156.7	157.8	158.7	159.8	161.4	162.6	164.4	166.6	170.3
Aero-engine and aero-engine parts sector	150.4	151.1	152.6	153.8	154.6	156.4	158.2	159.9	161.6	163.3	166.1	168.8	172.4
Aero-engine parts sector	149.7	150.9	152.0	153.3	154.2	155.4	156.6	157.8	159.1	160.5	162.6	164.6	168.0
Aircraft components sector	151.0	152.3	153.2	154.2	154.7	155.8	156.8	157.8	158.6	159.8	161.8	164.1	168.0
3 ALL PURCHASES OF GOODS BY		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	150.8	151.9	154.1	154.8	155.3	156.6	158.9	159.5	161.3	161.8	164.4	167.4	170.3
Airframe sector	150.6	151.4	153.0	153.6	154.1	155.5	158.1	158.9	160.8	161.4	163.8	166.6	169.0
Aero-engine and aero-engine parts sector	151.7	153.1	156.1	156.9	157.3	158.5	160.8	161.5	163.3	163.5	166.1	169.3	172.6
Aero-engine parts sector	151.4	152.7	155.1	156.4	156.9	157.9	159.4	160.2	161.5	162.2	164.6	167.3	170.9
Aircraft components sector	150.3	151.6	152.7	153.6	154.1	155.3	156.9	157.7	158.8	159.8	162.1	164.6	167.9
Radio, radar and electronic capital goods industry	149.5	150.6	151.8	152.5	152.8	154.2	156.5	157.6	158.7	159.8	162.5	165.5	p 168.0
4 SALARIES AND GENERAL EXPENSES		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	149.5	149.3	151.4	151.4	151.6	153.3	159.0	158.8	161.9	160.9	164.6	168.8	169.5
Airframe sector	148.2	148.1	150.1	150.1	150.3	152.0	157.2	157.0	160.1	159.2	162.8	166.7	167.4
Aero-engine and aero-engine parts sector	151.0	150.8	152.9	153.0	153.2	154.3	160.9	160.8	163.8	162.8	166.5	170.8	171.6
Aero-engine parts sector	152.2	152.1	154.1	154.3	154.6	156.3	162.4	162.4	165.4	164.6	168.2	172.3	173.2
Aircraft components sector	150.1	150.0	152.1	152.1	152.2	154.0	160.1	159.9	163.1	162.0	165.8	170.1	170.6
Radio, radar and electronic capital goods industry	153.0	152.9	155.0	155.0	155.1	157.1	162.7	162.6	166.0	164.6	168.9	173.5	p 173.9
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS								p	p	p	p	p	p
Aerospace industry	138.4	137.7	140.5	140.3	140.4	142.7	145.9	145.2	149.2	146.8	151.6	156.1	155.6
Radio, radar and electronic capital goods industry	143.0	145.7	148.1	146.9	144.9	146.8	151.5	153.1	153.3	153.1	156.1	163.7	p 161.0
6 COMBINED COSTS		p	p	p	p	p	p	p	p	p	p	p	p
Aerospace industry	148.2	148.6	150.8	151.2	151.4	153.0	156.5	156.8	159.4	158.8	162.2	165.9	167.5
Airframe sector	147.9	148.2	150.0	150.3	150.6	152.2	155.8	156.2	158.8	158.4	161.5	165.1	166.4
Aero-engine and aero-engine parts sector	149.0	149.6	152.2	152.6	152.9	154.4	157.8	158.2	160.8	160.2	163.5	167.3	169.2
Aero-engine parts sector	148.8	149.2	151.5	152.1	152.5	153.9	157.2	157.6	160.0	159.6	163.0	166.4	168.3
Aircraft components sector	147.3	147.6	149.4	149.7	149.9	151.5	155.2	155.5	158.1	157.5	160.9	164.7	166.0
Radio, radar and electronic capital goods industry	149.9	150.7	152.5	152.6	152.5	154.2	158.2	158.9	160.7	160.7	164.0	168.4	p 169.2

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Capital expenditure of the manufacturing, distributive and service industries in the first quarter of 1979: revised estimates

Manufacturing industry

The latest estimate of fixed investment by manufacturing industry in the first quarter of 1979 is £946 million at 1975 prices, seasonally adjusted. This confirms the provisional estimate of a fall of 4 per cent from the level in the fourth quarter of 1978. The first quarter results have however been below trend throughout the period of increasing investment since the trough in the first quarter of 1976. A better guide to the trend in the volume of investment is given by comparing the results for the six months to the end of March 1979 with the preceding six months and, on this basis investment has fallen by less than 1 per cent. If the iron and steel industry is excluded investment has risen by just over 1 per cent.

Using the same half yearly comparison for investment by industries shows rises of 27 per cent for the vehicles, 11 per cent for the textiles, leather and clothing and 7 per cent for the coal and petroleum products industry groups. The volume of investment by the drink and tobacco, the chemicals and the paper, printing and publishing industries was little changed and that of the iron and steel industry fell by just over 20 per cent. The remaining five industries recorded falls ranging from about 4 per cent to about 8 per cent.

Investment in individual assets shows a rise of 2 per cent in new building work, a fall of 13 per cent in vehicles and no change in plant and machinery on a half yearly comparison.

Table 1 **Fixed capital expenditure at 1975 prices seasonally adjusted of manufacturing, distributive and service industries**

£ million

		Analysis by industrial sectors			Analysis by type of asset		
Period	Total	Manufacturing industries	Distributive and service industries (excluding shipping)	Shipping industry	New building work	Vehicles	Plant and machinery
1967	6 680	3 412	2 985	283	2 439	1 150	3 091
1968	7 386 (7 232) [1]	3 642 (3 549)	3 262 (3 251) [1]	483 (433) [1]	2 510	1 431 (1 381) [1]	3 446 (3 342) [1]
1969	7 763 (7 917) [1]	3 898 (3 991)	3 478 (3 489) [1]	387 (437) [1]	2 716	1 386 (1 436) [1]	3 661 (3 765) [1]
1970	8 470	4 196	3 669	605	2 766	1 603	4 101
1971	8 413	3 923	3 888	602	2 870	1 546	3 997
1972	8 249	3 398	4 055	796	2 585	1 891	3 774
1973	8 997	3 504	4 674	818	2 740	2 097	4 160
1974	9 112	3 822	4 605	685	2 656	2 010	4 446
1975	7 929	3 522	3 841	565	2 158	1 590	4 181
1976	7 601	3 345	3 926	329	1 993	1 552	4 056
1977	8 296	3 573	4 325	398	1 998	1 768	4 530
1978	8 729	3 856	4 677	197	2 116	1 677	4 936
1972							
1st qtr	2 047	901	965	181	653	431	963
2nd	2 069	841	1 016	211	650	478	941
3rd	2 024	829	1 015	180	632	466	926
4th	2 110	827	1 059	224	650	516	944
1973							
1st qtr	2 304	878	1 167	259	708	571	1 026
2nd	2 168	845	1 157	166	683	471	1 015
3rd	2 224	912	1 158	154	697	483	1 044
4th	2 300	869	1 192	239	652	573	1 076
1974							
1st qtr	2 300	951	1 224	124	713	468	1 119
2nd	2 269	948	1 160	161	668	494	1 107
3rd	2 267	948	1 117	202	651	529	1 086
4th	2 276	975	1 104	197	625	518	1 133
1975							
1st qtr	2 076	942	967	167	572	438	1 065
2nd	2 027	901	967	159	562	405	1 061
3rd	1 957	850	967	140	526	385	1 047
4th	1 868	830	940	99	498	362	1 008
1976							
1st qtr	1 840	813	936	92	508	367	965
2nd	1 854	828	972	54	496	362	996
3rd	1 975	849	1 005	121	498	442	1 035
4th	1 932	856	1 014	62	491	380	1 061
1977							
1st qtr	1 988	851	1 030	107	476	437	1 075
2nd	2 024	879	1 044	101	470	445	1 109
3rd	2 111	910	1 103	98	516	451	1 144
4th	2 174	932	1 149	93	535	436	1 203
1978							
1st qtr	2 150	923	1 162	65	503	435	1 213
2nd	2 186	963	1 174	50	532	419	1 234
3rd	2 213	982	1 162	69	537	443	1 233
4th	2 180	988	1 179	13	544	380	1 257
1979							
1st qtr	2,177	946	1,209	23	518	412	1,248

The figures given above cover a wide sector of the economy, accounting – after exclusion of dwellings – for some 52 per cent of all UK gross domestic fixed capital formation in 1977. The scope of manufacturing and the distributive and service industries is defined in the notes at the end of the article, and falls very largely in the private sector of the economy, although some public sector elements are included as appropriate (notably the British Steel Corporation, in manufacturing industry). Exploration and development work in the North Sea (order II is excluded.)

[1] After allowing for expenditure, brought forward into 1968 from 1969 to secure the higher rate of investment grants which ended on 31 December 1968: estimated at £93 million for manufacturing industry. £11 million for distributive and service industries, and £50 million for shipping. The estimate for shipping is particularly uncertain because of the erratic nature of this industry's capital expenditure, while that for the distributive and service industries is uncertain because of the smallness of the effect.

Distributive and service industries (excluding shipping)

The incorporation of additional returns produces a revised estimate of £1,209 million, at 1975 prices, seasonally adjusted, for the investment by these industries in the first quarter of 1979. This is slightly lower than the provisional estimate of £1,214 million, and about 2½ per cent greater than the expenditure in the previous quarter. This increase was attributable to increased investment in vehicles (a rise of about 6 per cent) and in plant and machinery (about 3 per cent), slightly offset by a small reduction (1 per cent) in respect of new building work.

In the classification into industry groups, the corresponding increases were greatest for retail distribution (some 12 per cent) and the residual group of industries (2 per cent). The further rise in investment by the finance group (including leasing) was modest (less than 1 per cent) but continued the growth which has been sustained for the past two years.

Shipping

The revised estimate of investment by the shipping industry in the first quarter is £23 million, at 1975 prices, seasonally adjusted, somewhat higher than the provisional estimate of £20 million, and confirming a further fluctuation in this series, since the estimate is appreciably greater than that for the previous quarter, but less than half the quarterly average for 1978.

Notes

The estimation of changes in the volume of capital expenditure (as distinct from changes

Notes to tables

Capital expenditure comprises expenditure on vehicles (including ships) and plant and machinery less receipts from sales of these assets, and on new building work.

The analysis by industry group follows the standard industrial classification revised 1968 edition:

Manufacturing orders III to XIX

Distributive trades order XXIII

Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses and similar businesses)

Retail MLH 820, 821

Other industries order XX (construction): XXII (transport and communication) excluding 701 – railways, 706 – port and inland water transport, 707 – air transport and 708 – postal services and telecommunications: XXIV (insurance, banking, finance and business services) including leasing by finance houses and similar businesses and excluding Trustee Savings Banks; XXV (professional and scientific services) excluding 872 – educational services and 874 – medical and dental services; and XXVI (miscellaneous services).

SIC orders I (agriculture, forestry and fishing), II (mining and quarrying), XXI (gas, electricity and water), and XXVI (public administration and defence) are completely excluded.

The estimates with the exception of those for manufacturing industry in table 2, are shown to the nearest £m but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3, because of the margin of error involved in the quarterly seasonal adjustments. Also, there may be an apparent discrepancy between the total and the sum of the constituent parts due to rounding.

See also footnotes to table 1.

Table 2 Fixed capital expenditure of manufacturing industry at 1975 prices seasonally adjusted

£ million

	Analysis by industry group													Analysis by type of asset		
		Food, drink and tobacco						Engineering, shipbuilding and metal goods								
Period	Total all manufacturing industries	Food [1]	Drink and tobacco [1]	Coal and petroleum products	Chemicals	Iron and steel	Non-ferrous metals	Instrument and electrical engineering	Other	Vehicles	Textiles leather and clothing	Paper, printing and publishing	Other manufacturing industries	New building work	Vehicles	Plant and machinery
1970	4 196.4	503.8		176.5	785.6	318.1	200.0	807.5		434.2	314.3	262.8	393.6	1 000.2	222.0	2 974.2
1971	3 922.5	505.3		251.9	683.6	467.6	131.8	708.9		274.9	265.0	214.7	418.8	905.2	222.0	2 795.3
1972	3 397.8	519.4		214.9	492.2	439.7	77.3	640.8		179.2	217.0	194.3	423.0	738.0	239.4	2 420.4
1973	3 504.1	297.4	269.6	86.1	389.3	347.1	63.3	263.7	508.9	259.3	314.5	225.6	479.3	738.7	260.1	2 505.3
1974	3 822.0	318.8	254.4	92.6	440.1	416.0	78.3	299.4	553.7	315.9	336.7	249.0	467.1	727.1	273.6	2 821.3
1975	3 521.9	285.1	181.0	111.3	545.5	513.2	77.7	258.3	501.9	269.8	233.4	210.8	333.9	639.9	199.9	2 682.1
1976	3 345.3	268.9	168.3	90.1	556.0	585.2	51.2	254.0	468.1	247.9	170.9	177.9	306.8	513.9	239.7	2 591.7
1977	3 572.6	360.5	217.3	75.4	622.3	451.1	61.0	304.8	502.6	287.2	150.8	173.3	366.3	547.1	285.8	2 739.7
1978	3 855.6	374.9	235.8	123.2	745.8	301.1	66.6	378.6	538.7	410.6	143.5	199.6	337.2	620.3	261.9	2 973.4
1974																
1st qtr	951.1	84.3	68.3	21.0	100.6	89.1	18.2	71.5	144.7	79.2	86.6	58.3	129.3	191.6	68.4	691.1
2nd	948.3	76.5	71.3	20.8	103.1	97.4	21.2	73.8	134.0	79.9	87.2	63.7	119.4	182.1	69.2	697.0
3rd	947.5	80.5	61.9	23.6	108.4	95.9	19.4	76.6	138.4	81.1	85.3	62.9	113.5	174.8	69.8	702.9
4th	975.1	77.5	52.9	27.2	128.0	133.6	19.5	77.5	136.6	75.7	77.6	64.1	104.9	178.6	66.2	730.3
1975																
1st qtr	941.7	76.5	50.5	27.4	140.2	111.7	30.4	71.9	136.1	75.5	67.5	58.5	95.5	176.7	54.3	710.7
2nd	900.8	72.9	46.7	30.1	140.7	123.6	15.0	67.3	133.8	70.5	59.4	53.0	87.8	167.6	47.5	685.7
3rd	849.9	69.0	34.7	32.5	138.3	135.5	16.6	58.4	122.6	61.3	53.8	52.7	74.5	155.9	47.8	646.2
4th	829.5	66.7	49.1	21.3	126.3	142.4	15.7	60.7	109.4	62.5	52.7	46.6	76.1	139.7	50.3	639.5
1976																
1st qtr	813.0	63.6	38.3	27.8	125.7	154.6	14.0	63.3	109.3	52.5	47.6	46.3	70.0	135.0	53.6	624.4
2nd	827.8	64.3	35.9	22.5	137.0	155.7	12.0	60.0	116.3	62.7	43.4	45.9	72.1	126.3	60.7	640.8
3rd	848.7	69.9	47.2	19.8	144.9	147.6	12.0	63.5	114.5	63.9	41.0	43.5	80.9	126.9	62.3	659.5
4th	855.8	71.1	46.9	20.0	148.4	127.3	13.2	67.2	128.0	68.8	38.9	42.2	83.8	125.7	63.1	667.0
1977																
1st qtr	851.2	81.8	52.1	15.5	142.0	124.9	12.6	69.3	119.6	64.2	39.2	42.2	87.8	128.2	70.0	653.0
2nd	879.1	92.4	57.5	18.8	150.8	111.4	14.8	73.4	125.1	64.2	38.3	42.3	90.1	134.4	75.5	669.2
3rd	910.2	94.1	58.0	18.0	163.3	102.1	17.0	83.2	128.8	74.4	35.7	44.6	91.0	139.3	69.2	701.7
4th	932.1	92.2	49.7	23.1	166.2	112.7	16.6	78.9	129.1	84.4	37.6	44.2	97.4	145.2	71.1	715.8
1978																
1st qtr	923.1	89.1	71.2	22.6	171.9	86.3	15.2	88.3	129.2	79.7	35.3	49.0	85.3	142.0	68.8	712.3
2nd	963.0	103.6	57.9	30.4	177.0	86.7	16.7	90.2	128.0	105.8	32.8	48.8	85.1	146.5	68.8	747.7
3rd	981.7	88.1	50.9	38.5	198.5	65.6	18.0	106.0	144.2	98.4	36.2	49.9	87.4	161.7	67.7	752.3
4th	987.8	94.1	55.8	31.7	198.4	62.5	16.7	94.1	137.3	126.7	39.2	51.9	79.4	170.1	56.6	761.1
1979																
1st qtr	945.7	85.2	51.8	41.8	183.2	59.2	15.2	85.1	125.3	132.6	37.3	49.0	80.0	145.8	62.0	737.9

[1] These columns represent the division of the columns 'food, drink and tobacco, engineering, shipbuilding and metal goods', formerly shown. This split is not available for the years 1970 to 1972.

Table 3 Fixed capital expenditure in the distributive and service industries (excluding shipping) at 1975 prices seasonally adjusted

£ million

	Analysis by industry group				Analysis by type of asset		
Period	Total	Wholesale distribution	Retail distribution	Finance [2]	Other industries	New building work	Vehicles	Plant and machinery
1968	3 262 (3 251) [1]	345	539	923 (916) [1]	1 454 (1 450)	1 640	751	870 (859) [1]
1969	3 478 (3 489)	332	552	1 052 (1 059)	1 542 (1 546)	1 710	794	974 (985) [1]
1970	3 669	365	547	1 241	1 516	1 752	803	1 114
1971	3 888	384	582	1 377	1 546	1 959	743	1 187
1972	4 055	405	685	1 391	1 575	1 841	893	1 322
1973	4 674	396	790	1 755	1 733	1 997	1 034	1 644
1974	4 605	438	778	1 774	1 615	1 922	1 064	1 620
1975	3 841	362	672	1 452	1 355	1 509	838	1 494
1976	3 926	337	666	1 508	1 415	1 469	1 002	1 455
1977	4 325	370	750	1 642	1 563	1 437	1 101	1 787
1978	4 677	378	779	1 985	1 535	1 489	1 230	1 958
1973								
1st qtr	1 167	103	192	443	429	527	250	390
2nd	1 157	98	197	438	424	504	245	409
3rd	1 158	95	206	409	449	504	268	386
4th	1 192	100	196	464	432	462	271	459
1974								
1st qtr	1 224	118	190	490	427	520	278	426
2nd	1 160	107	192	439	421	484	267	408
3rd	1 117	112	186	434	385	475	260	382
4th	1 104	101	211	411	382	443	258	403
1975								
1st qtr	967	98	158	365	346	394	221	353
2nd	967	92	167	376	332	392	201	374
3rd	967	87	171	371	338	367	201	399
4th	940	85	175	340	340	357	215	368
1976								
1st qtr	936	82	164	353	336	371	227	338
2nd	972	83	182	359	348	367	252	353
3rd	1 005	86	160	386	372	369	263	372
4th	1 014	86	160	410	359	361	261	392
1977								
1st qtr	1 030	81	184	375	390	347	263	420
2nd	1 044	92	183	385	384	332	274	439
3rd	1 103	97	197	426	383	374	287	442
4th	1 149	101	186	455	407	385	277	487
1978								
1st qtr	1 162	90	200	474	398	360	303	499
2nd	1 174	94	206	485	389	384	305	485
3rd	1 162	96	187	507	372	374	309	479
4th	1 179	98	186	519	376	372	313	495
1979								
1st qtr	1 209	94	209	521	385	370	331	509

[1] See footnote to table 1 [2] Including leasing, on the basis of the ownership of assets.

Table 4 Fixed capital expenditure at current prices of manufacturing, distributive and service industries

£ million

Period	Total	Manufacturing industry	Distributive and service industries (excluding shipping	Shipping industry
1968	3 304	1 639	1 418	247
1969	3 629	1 822	1 589	217
1970	4 294	2 130	1 799	364
1971	4 648	2 187	2 078	384
1972	4 971	2 044	2 373	553
1973	6 071	2 347	3 090	635
1974	7 360	3 067	3 682	611
1975	7 929	3 522	3 841	565
1976	8 841	3 958	4 497	386
1977	11 033	4 862	5 611	560
1978	12 878	5 794	6 698	386
1973				
1st qtr	1 455	555	734	166
2nd	1 378	521	738	118
3rd	1 464	612	743	109
4th	1 775	659	875	242
1974				
1st qtr	1 673	693	890	90
2nd	1 684	688	871	125
3rd	1 848	776	899	173
4th	2 155	910	1 022	223
1975				
1st qtr	1 895	860	893	142
2nd	1 890	832	920	138
3rd	1 989	869	972	148
4th	2 155	961	1 056	138
1976				
1st qtr	2 034	918	1 020	96
2nd	1 999	893	1 053	53
3rd	2 274	997	1 130	146
4th	2 534	1 150	1 293	92
1977				
1st qtr	2 491	1 106	1 263	122
2nd	2 498	1 101	1 284	114
3rd	2 792	1 233	1 414	145
4th	3 251	1 421	1 651	180
1978				
1st qtr	3 018	1 322	1 584	112
2nd	3 016	1 346	1 584	86
3rd	3 251	1 456	1 639	156
4th	3 594	1 671	1 891	32
1979				
1st qtr	3 296	1 471	1 786	40

at current prices) is subject to greater uncertainty when the rate of price increases is varying and this should be borne in mind in using the figures.

It should be remembered that there has been an increase during recent years in the practice of obtaining capital goods through some form of leasing or rental arrangements rather than by purchase. Expenditure on capital goods acquired for leasing out is classified to the service industries on the basis of ownership of the assets. Insofar as this leasing is to firms in manufacturing industry, there is an apparent switch of investment from manufacturing to the service industries in the figures. When this is taken into account, the figures in the table for manufacturing investment are increased as follows:

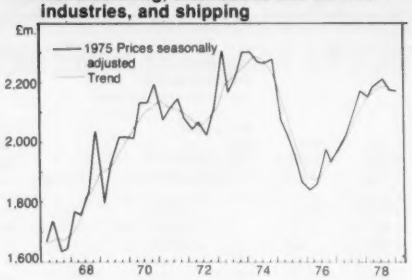
Manufacturers' investment plus estimates of assets leased from the service industries

1975 prices, £ million

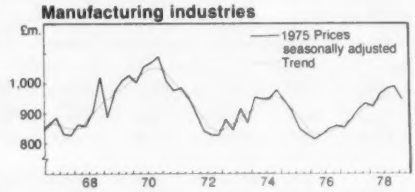
Year		Year	
1975	3 710	1977	3 850
1976	3 540	1978 [1]	4 215

[1] Estimated.

Manufacturing, distributive and service industries, and shipping

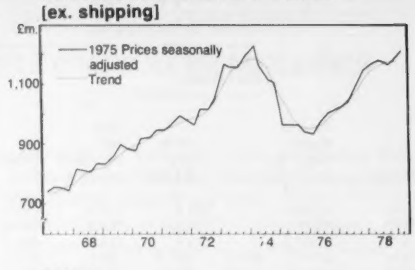


Manufacturing industries

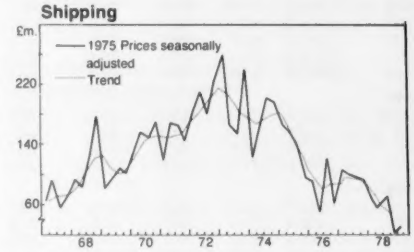


Data are not available prior to 1975. An article on investment in assets for leasing was published in *Trade and Industry* on 29 September 1978.

Distributive and service industries (ex. shipping)



Shipping



Inquiries: Manufacturing industry 01-212 3175/3176; distributive and service industries 01-212 3345.

Unemployment and vacancies: June

The number of unemployed persons in Great Britain on 14 June, was 1 282 102 representing 5.4 per cent of the total number of employees. This total includes 137 110 school leavers under 18 not yet employed.

The seasonally adjusted series shows that the number of unemployed in Great Britain excluding the school leavers was 1 221 700 (5.2 per cent of all employees), a decrease of 25 500 since 10 May. In the last three months there has been a decrease on average of 26 400 a month.

Of the total unemployed in Great Britain, 265 000 had been unemployed for four weeks or less. It is estimated that about 897 000 were unemployed for more than four weeks, and were aged under 60.

Figures for unemployment in the United Kingdom are given in the table.

The average number joining the unemployment register in the three months ending May was 345 000 per month compared with 354 000 in the three months ending February and 393 000 in the three months ending November 1978. The average numbers leaving the register in these three periods were 372 000, 347 000, and 401 000 per month respectively.

The average inflow of vacancies in the three months ending May was 233 000 per month compared with 210 000 in the three months ending February and 237 000 in the three months ending November 1978. The average outflows in the three periods were 227 000, 206 000 and 233 000 per month respectively.

Adult students

The unemployment figures exclude adult students aged 18 and over, who are registered for temporary employment during a vacation and who intend to return to full-time education when the new term begins. On 14 June these numbered 6990 in Great Britain and 9735 in the United Kingdom.

Temporarily stopped

The unemployment figures do not include temporarily stopped workers – that is, those who had a job on the day of the count but were temporarily suspended from work on that day and were registered in order to claim benefits. These numbered 5490 in Great Britain and 5934 in the United Kingdom – representing a decrease on 10 May of 2052 in Great Britain and a decrease of 1835 in the United Kingdom.

Short-time working

In the week ending 7 April 1979, 32 000 operatives in manufacturing industries in Great Britain were on short-time working. Of these, 6000 were stood off for the whole week and 26 000 for part of the week. The figure compares with a total of 39 000 on short-time in the week ending 10 March 1979. The short-time working figures include temporarily stopped workers.

Notified vacancies

The number of vacancies notified to employment offices in Great Britain remaining unfilled on 8 June was 275 447, an increase of 9089 since last month. The number of vacancies notified to careers offices was 37 210, a decrease of 3749 since last month.

The seasonally adjusted series shows that the number of vacancies notified to employment offices in Great Britain was 261 000, an increase of 5200 since May 1979.

Figures for notified vacancies in the United Kingdom are given in the table.

Unemployment (on 14 June 1979)

	Great Britain		United Kingdom	
	Number	Change since May	Number	Change since May
Unemployed, excluding school leavers	1 144 992	−57 287	1 201 095	−58 892
School leavers	137 110	+100 921	143 770	+104 475
Total unemployed	1 282 102	+43 634	1 344 865	+45 583
(Percentage of all employees)	(5.4)	(+0.2)	(5.6)	(+0.2)
Seasonally adjusted				
Unemployed, excluding school leavers	1 221 700	−25 500	1 279 600	−26 800
(Percentage of all employees)	(5.2)	(−0.1)	(5.3)	(−0.1)

Notified vacancies [1] (unfilled on 8 June 1979)

	Great Britain		United Kingdom	
	Number	Change since May	Number	Change since May
Notified to employment offices	275 447	+9 089	276 964	+9 048
Notified to careers offices	37 210	−3 749	37 450	−3 815
Seasonally adjusted				
Notified to employment offices	261 000	+5 200	262 400	+5 100

[1] Vacancy figures are not a measure of total vacancies, but only of those notified to employment offices and careers offices.

Economic Trends

A monthly journal, compiled by the Central Statistical Office, for those who want to follow the main trends of the economic situation in the United Kingdom. It brings together the main statistical series of employment, output, consumption, trade and finance, and each issue contains special feature articles on some aspect of the statistics.

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Manufacturers' and distributors' stocks in the first quarter of 1979: revised estimates

Revised figures indicate that the level of stocks held by manufacturers, wholesalers and retailers rose by about £270 million, at 1975 prices, seasonally adjusted, in the first quarter of 1979, £70 million more than provisionally estimated.

Manufacturing industry

It is now estimated that manufacturers' stocks rose by about £80 million, at 1975 prices, seasonally adjusted, in the first quarter of 1979. This rise is about £50 million more than provisionally estimated due to upward revisions to the levels of stocks of materials and fuel and of work in progress. The revised figures show that stocks of materials and fuel were unchanged during the quarter. Work in progress rose by about £25 million and finished goods stocks by about £55 million.

There was a fairly large increase in stocks of the engineering industries equivalent to about 1 per cent of the opening level. There were small increases in stocks of the chemicals and textiles industries but stocks of the other industries all fell slightly.

The stocks/output ratio rose during the quarter from 102.6 at end-December to 104.3 at end-March due to the increase in stocks and the fall in manufacturing output. The ratios for each asset rose during the quarter.

Distributive industries

Further information from wholesalers indicates that their stocks increased by about £100 million, at 1975 prices, seasonally adjusted, in the first quarter of 1979, some £20 million more than the provisional estimate. General wholesale distributors recorded the largest quarterly rise in stocks since 1973, the changes for the other two wholesaling trades largely offsetting one another. Retailers' stocks rose by about £90 million, at 1975 prices, seasonally adjusted, in the first quarter.

Note

The estimation of physical change in stocks is subject to greater uncertainty when the rate of price increase is varying and this should be borne in mind when using the figures.

Inquiries: Manufacturing industry 01-215 3175/5215. Distributive industries 01-215 3345.

Notes to tables 1 to 4

1 The analysis by industry group follows the standard industrial classification (1968 edition):
Manufacturing orders III to XIX.
Distributive trades order XXII:
Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses)
Retail MLH 820, 821.

2 Book values exclude VAT. Purchase tax payable on retailer's stock prior to the second quarter of 1973.

3 The estimates are shown to the nearest £ million but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3 because of the margin of error involved in quarterly seasonal adjustments. Difference between totals and the sum of constituent parts are due to rounding.

r Revised. p Provisional.

Table 1 **Value of physical increase in industry's stocks at 1975 prices seasonally adjusted**

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1978	28 651	20 591	4 546	3 514
1967	229	119	31	79
1968	814	530	160	124
1969	789	600	131	58
1970	805	616	202	−13
1971	−47	−277	218	12
1972	−77	−279	173	29
1973	2 392	1 336	432	624
1974	1 469	1 288	361	−180
1975	−1 570	−1 221	−249	−100
1976	460	316	131	13
1977	737	442	266	29
1978	935	597	6	333
1973				
1st qtr	638	384	115	139
2nd	729	341	74	314
3rd	531	337	119	75
4th	493	274	123	96
1974				
1st qtr	78	54	87	−63
2nd	662	453	156	53
3rd	654	686	62	−94
4th	74	94	56	−76
1975				
1st qtr	−447	−258	−84	−105
2nd	−432	−230	−107	−95
3rd	−481	−476	−45	40
4th	−210	−257	−13	60
1976				
1st qtr	37	−13	43	7
2nd	−106	−29	−10	−67
3rd	226	99	81	46
4th	304	260	17	27
1977				
1st qtr	434	235	82	117
2nd	280	97	179	4
3rd	−145	−6	−80	−59
4th	168	116	85	−33
1978				
1st qtr	181	38	81	62
2nd	338	272	−62	128
3rd	274	175	45	54
4th	143	112	−59	89
1979				
1st qtr	270	83	100	87

Table 2 **Value of the physical increase of stocks held by manufacturing industry at 1975 prices seasonally adjusted**

£ million

	Analysis by industry group							Analysis by type of asset		
	All manufacturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manufacture	Engineering, shipbuilding, vehicles and metal goods	Textiles, leather and clothing	Other manufacturing industries	Materials and fuel	Work in progress	Finished goods
Level of stocks at end 1978	20 591	2 548	2 521	1 735	10 124	1 408	2 256	7 264	7 755	5 573
1967	119	57	15	−82	219	−68	−22	−29	245	−96
1968	530	16	174	73	112	59	97	220	199	112
1969	600	55	181	−31	124	134	138	194	43	364
1970	616	17	103	98	400	—	−2	234	215	166
1971	−277	17	39	14	−311	−29	−8	−291	−170	184
1972	−279	34	3	−89	−162	−95	30	−88	58	−248
1973	1 336	152	251	60	595	75	203	829	544	−38
1974	1 288	261	403	7	459	19	138	658	53	577
1975	−1 221	−360	−285	21	−207	−96	−295	−926	−272	−23
1976	316	16	97	236	−80	−3	51	−65	222	159
1977	442	160	−84	−37	275	30	98	−18	196	264
1978	597	213	59	−70	401	−25	19	−13	434	176
1973										
1st qtr	384	6	60	53	162	11	91	218	190	−25
2nd	341	28	87	6	163	17	41	247	99	−6
3rd	337	68	95	12	94	26	42	192	161	−15
4th	274	50	9	−11	176	21	30	172	94	8
1974										
1st qtr	54	92	273	−152	−74	−29	−57	336	−138	−145
2nd	453	135	35	29	135	34	87	63	148	243
3rd	686	94	154	92	231	28	89	274	108	304
4th	94	−60	−58	39	168	−14	20	−15	−65	175
1975										
1st qtr	−258	−95	−107	93	−13	−30	−107	−292	−77	110
2nd	−230	−120	−49	16	24	−32	−69	−156	−45	−28
3rd	−476	−105	−89	−70	−95	−36	−81	−338	−90	−48
4th	−257	−39	−41	−17	−123	2	−38	−140	−60	−57
1976										
1st	−13	−14	12	−7	−7	22	−20	−89	42	34
2nd	−29	−12	26	48	−83	−14	7	−47	38	−20
3rd	99	−20	19	96	−24	−7	35	48	38	14
4th	260	61	41	99	33	−4	30	23	105	131
1977										
1st qtr	235	17	9	35	120	13	41	91	123	21
2nd	97	42	−47	−3	22	34	50	−38	−69	204
3rd	−6	76	−56	−25	9	−9	—	−23	−33	50
4th	116	25	11	−43	124	−8	7	−48	175	−11
1978										
1st qtr	38	54	37	−87	−7	5	38	−26	17	48
2nd	272	107	−22	−8	209	−13	−3	−15	128	158
3rd	175	31	−37	19	180	−16	−2	20	102	52
4th	112	21	80	8	19	−1	−15	8	186	−82
1979										
1st qtr	83	−15	13	−16	92	13	−4	−1	27	56

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Table 3 **Value of the physical increase of stocks held by wholesalers at 1975 prices seasonally adjusted**

£ million

	Total wholesalers	General wholesale distributors	Dealers in coal, builders materials etc	Dealers in industrial materials and machinery
Level of stocks at end 1978	4 546	2 893	362	1 291
1967	31	17	1	14
1968	160	107	9	44
1969	131	81	3	47
1970	202	48	5	149
1971	218	181	−3	40
1972	173	147	29	−3
1973	432	433	4	−6
1974	361	213	15	133
1975	−249	−255	−26	32
1976	131	117	12	2
1977	266	158	−3	111
1978	6	3	13	−11
1973				
1st qtr	115	108	−16	23
2nd	74	80	15	−21
3rd	119	124	5	−9
4th	123	122	1	1
1974				
1st qtr	87	91	−6	3
2nd	156	101	13	43
3rd	62	9	—	53
4th	56	13	9	34
1975				
1st qtr	−84	−104	1	19
2nd	−107	−108	−12	13
3rd	−45	−24	−10	−11
4th	−13	−19	−5	11
1976				
1st qtr	43	43	19	−18
2nd	−10	45	−13	−41
3rd	81	26	9	47
4th	17	4	−3	15
1977				
1st qtr	82	55	8	20
2nd	179	45	14	121
3rd	−80	4	−44	−41
4th	85	54	20	11
1978				
1st qtr	81	63	−37	55
2nd	−62	−48	19	−33
3rd	45	18	−6	33
4th	−59	−31	38	−66
1979				
1st qtr	100	102	−29	26

Table 4 **Increase in the book value of manufacturers' and distributors' stocks**

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1978	44 152	31 998	6 936	5 218
1967	278	180	47	51
1968	871	581	138	152
1969	1 013	766	134	113
1970	1 347	1 038	207	102
1971	868	471	264	133
1972	1 030	618	298	114
1973	3 699	2 425	793	481
1974	6 335	4 978	938	419
1975	3 054	2 259	348	447
1976	6 200	4 591	1 143	466
1977	5 094	3 578	898	618
1978	4 539	3 227	511	801
1973				
1st qtr	681	459	121	101
2nd	749	515	138	96
3rd	1 031	627	289	115
4th	1 237	824	244	169
1974				
1st qtr	1 771	1 469	243	59
2nd	1 834	1 388	264	182
3rd	1 532	1 221	239	72
4th	1 197	899	192	106
1975				
1st qtr	973	894	18	61
2nd	612	559	15	38
3rd	530	218	158	154
4th	940	588	158	194
1976				
1st qtr	1 124	877	192	55
2nd	1 219	1 014	214	−9
3rd	1 666	1 091	407	168
4th	2 191	1 610	329	252
1977				
1st qtr	2 104	1 527	281	296
2nd	1 334	936	273	125
3rd	696	408	222	66
4th	959	707	121	131
1978				
1st qtr	683	487	91	105
2nd	1 358	1 077	60	222
3rd	1 071	594	289	188
4th	1 427	1 070	71	286
1979				
1st qtr	1 920	1 369	353	198

Graph 1 – **Value of physical increase in industry's stocks at 1975 prices seasonally adjusted**

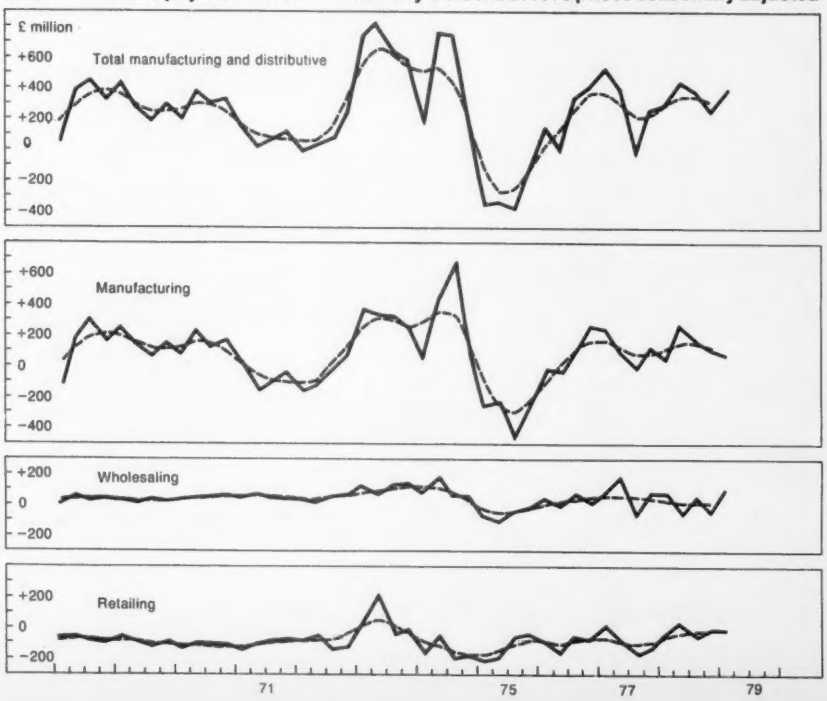

Table 5 **Relationship of manufacturers' stocks to manufacturing production**

Index numbers – fourth quarter 1974 = 100 — Seasonally adjusted

Period (quarters)	Total stock levels (at 1975 prices)	Production (with 1975 net output weights)	Ratio of stocks to production: Total	Materials and fuel	Work in progress	Finished goods
1973						
1st qtr	89.0	102.1	87.1	82.9	92.3	86.8
2nd	90.7	103.4	87.7	84.8	92.5	85.6
3rd	92.4	104.3	88.6	86.3	93.9	84.6
4th	93.7	104.3	89.8	88.2	95.1	84.7
1974						
1st qtr	94.0	99.9	94.1	96.2	97.4	85.6
2nd	96.2	104.3	92.2	92.9	95.3	86.7
3rd	99.5	103.2	96.4	97.0	97.7	93.5
4th	100.0	100.0	100.0	100.0	100.0	100.0
1975						
1st qtr	98.7	99.3	99.4	97.1	99.6	102.9
2nd	97.6	94.8	102.9	99.7	103.7	107.2
3rd	95.3	93.7	101.6	96.5	103.5	107.3
4th	94.0	94.4	99.6	94.0	101.9	105.4
1976						
1st qtr	94.0	94.7	99.2	92.6	102.2	105.8
2nd	93.8	97.2	96.5	89.7	100.1	102.7
3rd	94.3	97.2	97.0	90.3	100.6	102.9
4th	95.6	98.6	96.9	89.2	100.7	104.1
1977						
1st qtr	96.7	99.3	97.4	89.7	101.7	103.8
2nd	97.2	97.8	99.3	90.6	102.2	109.5
3rd	97.2	98.4	98.7	89.8	101.1	109.9
4th	97.7	97.3	100.4	90.2	104.8	111.0
1978						
1st qtr	97.9	97.8	100.1	89.5	104.6	111.4
2nd	99.3	99.9	99.3	87.4	104.2	112.2
3rd	100.1	100.5	99.5	87.1	104.9	112.5
4th	100.7	98.0	102.6	89.4	110.2	113.7
1979						
1st qtr	101.1	96.9	104.3	90.4	111.9	116.2

'T & I' index

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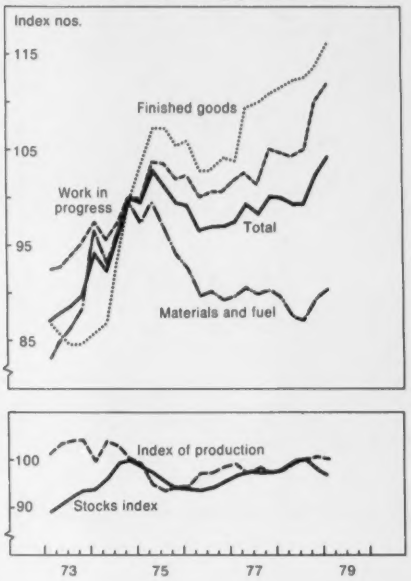
Graph 2 – **The relationship of manufacturers' stocks to manufacturing production**



UK imports invoiced in foreign currencies

Continuing fluctuations in currency exchange rates have led to an interest in the proportion of the United Kingdom's overseas trade which is invoiced in foreign currencies. Results of surveys relating to export shipments have been published (the latest relating to shipments in April 1978: *Trade and Industry*, 8 June 1979). This note gives the results of a similar survey relating to UK imports in March 1978.

A sample of nearly 7000 commercial import invoices (ie a 2 per cent sample) selected randomly, formed the basis of this survey. The overall proportion of UK imports, in terms of value, invoiced in foreign currencies was estimated at 72 per cent. Fifty-three per cent were invoiced in terms of the supplier countries' own currency (including shipments from the United States invoiced in US dollars), 17 per cent were invoiced in US dollars and 2 per cent in other foreign currency. Some limited work which related to imports a year earlier yielded estimates of 38, 22 and 2 per cent respectively, suggesting a decline between March 1977 and March 1978 in the popularity of the US dollar and an increased use of suppliers' own currency in preference to sterling.

Imports from the oil exporting countries were entirely invoiced in US dollars; from north America, western Europe and other developed countries they were primarily invoiced in the suppliers' own currency and, as a second choice, in sterling.

Table 1 **UK imports: invoicing currency analysis by area**

percentage by value

Shipments in March 1978	Western Europe	North America	Other developed countries	Oil exporting countries	Rest of world	Total all countries
Invoiced in own currency	54	80	67	0	39	53[1]
Invoiced in US dollars	8		8	100	28	17
Invoiced in other foreign currency	3	0	1	0	1	2
Invoiced in sterling	35	20	24	0	32	28

[1] Includes imports from USA invoiced in US dollars; the proportion excluding these imports would be 40 per cent.
0 Trade of less then 0.5 per cent of area total.

Table 2 **UK imports: invoicing currency analysis by commodity group**

Foreign currency invoicing proporion; percentage by value

	Shipments in March '78
Food, beverages and tobacco	40
Fuels	100
Basic materials	65
Chemicals	63
Textiles	62
Metals and articles of metal	37
Electrical machinery, apparatus and appliances	75
Other Machinery	82
Transport equipment	95
Other manufactured goods	75
Total	72

Imports from the rest of the world were also most commonly invoiced in the suppliers' own currency though to a less pronounced extent than imports from developed countries; sterling figured prominently as an alternative invoicing currency in these imports

Table 3 **UK imports: invoicing currency analysis by size of transaction**

Foreign currency invoicing proportion; percentage by value

up to £10,000	65
over £10,000 and up to £500,000	71
over £500,000	78
Total	72

(details of the analysis by area of supply are given in table 1). The results by commodity group (table 2) suggest that the adopted invoicing practice for imports of food, basic materials and semi-manufactures is more frequently in sterling than in the case of imports of finished manufactures. Table 3 indicates that there is a tendency for invoicing in foreign currency to be more common for higher value transactions.

Inquiries: Department of Trade, Room 282, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3445.

Nationality of vessels in UK seaborne trade: 1978

In terms of weight, 95.6 per cent of goods imported into the UK were carried by sea in 1978. The corresponding figure for exports was 97.9 per cent. The nationality of vessels (ie flags) carrying this trade varied from traditional maritime nations, including the UK and Norway, to many of the developing countries such as India – and from our European partners, principally the Federal Republic of Germany and the Netherlands, to flags of convenience such as Liberia and Panama.

Not all ships are engaged in the same type of trade, and the types of cargo carried by the world's shipping industry can be roughly divided into tanker cargoes, dry bulk cargoes, and general cargoes referred to in this article as 'other dry'. Short descriptions of these types of cargoes will be found below in each relevant section.

Seaborne trade to and from the United Kingdom, measured in terms of tonne-miles, increased by 2 per cent in 1978, the first increase since 1973. In terms of weight there was an increase of 3 per cent.

Table 1 **United Kingdom seaborne trade 1969-78**

Total (imports and exports combined)											Percentage carried by UK registered ships									
	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
by tonne-miles	thousand million tonne-miles										percentage of tonne-miles									
Dry cargo	315	330	358	347	358	331	317	325	324	336	55	51	52	48	41	40	41	35	35	31
Bulk	135	152	175	165	160	176	170	172	165	178	46	41	48	44	34	32	36	28	32	25
Other	180	178	183	181	198	155	147	152	158	158	62	60	56	49	47	48	46	42	38	37
Tanker cargo	784	845	939	938	1 064	1 069	818	685	532	538	29	31	30	28	29	29	29	32	31	28
All cargo	1 099	1 175	1 296	1 284	1 422	1 400	1 134	1 009	856	874	36	37	37	33	33	31	32	33	32	29
by weight	weight: million tonnes										percentage of weight									
Dry cargo	103	107	108	110	122	121	109	116	117	120	43	41	42	40	37	37	38	37	37	35
Bulk	54	57	56	62	70	62	66	65	66	66	41	41	43	41	36	34	37	35	36	32
Other	49	50	52	54	60	51	47	50	52	54	43	42	40	38	38	40	40	40	39	38
Tanker cargo	131	143	148	147	155	146	119	120	112	116	30	30	30	27	30	28	31	33	33	29
All cargo	234	250	256	257	277	268	228	237	229	236	36	34	34	33	33	32	34	35	35	32
by value	value: £ million										percentage by value									
Dry cargo	11 413	12 754	14 018	15 209	20 222	27 145	30 292	38 910	47 231	52 640	52	49	48	48	46	47	47	46	45	45
Bulk	1 012	1 134	1 150	1 195	1 677	3 095	3 204	3 859	4 180	4 031	32	30	31	30	27	28	31	29	30	28
Other	10 401	11 621	12 868	14 015	18 546	24 050	27 087	35 051	43 051	48 609	54	51	50	49	48	49	49	48	47	46
Tanker cargo	1 041	1 102	1 393	1 376	2 007	5 450	4 998	6 660	7 054	6 835	32	31	30	29	30	29	32	33	33	30
All cargo	12 454	13 856	15 411	16 585	22 231	32 596	35 290	45 569	54 285	59 475	50	48	46	46	45	44	45	44	44	43

Table 1a **United Kingdom seaborne trade 1968-78**

	Imports							Percentage carried by UK registered ships						
	1968	1971	1974	1975	1976	1977	1978	1968	1971	1974	1975	1976	1977	1978
by tonne-miles	thousand million tonne-miles							percentage of tonne-miles						
Dry cargo	226	269	238	227	237	224	234	55	51	36	39	32	34	30
Bulk	119	166	159	152	156	146	155	49	49	31	37	28	32	26
Other	107	103	79	75	80	78	78	61	54	45	43	41	39	37
Tanker cargo	620	923	1 054	804	664	496	493	22	30	29	29	32	31	29
All cargo	846	1 192	1 292	1 030	901	720	727	30	35	30	31	32	32	29
by weight	weight: million tonnes							percentage of weight						
Dry cargo	72	76	84	73	81	76	76	44	42	33	35	33	34	30
Bulk	43	46	54	47	52	48	48	46	44	30	33	30	31	25
Other	29	30	29	27	29	29	30	41	38	38	37	38	38	37
Tanker cargo	107	131	130	104	101	82	79	23	27	26	29	31	32	29
All cargo	179	206	214	177	181	159	155	32	32	29	31	32	33	29
by value	value: £ million							percentage by value						
Dry cargo	5 628	6 862	14 951	15 503	20 123	24 247	27 004	50	45	43	43	44	44	43
Bulk	921	1 086	2 837	2 821	3 517	3 708	3 363	35	31	28	31	29	30	28
Other	4 707	5 776	12 114	12 682	16 605	20 540	23 641	53	47	47	46	47	47	45
Tanker cargo	901	1 198	4 746	4 290	5 504	5 084	4 625	26	27	27	29	31	32	29
All cargo	6 529	8 060	19 697	19 793	25 627	29 332	31 629	46	42	39	40	41	42	41

Table 1b **United Kingdom seaborne trade 1968-78**

	Exports							Percentage carried by UK registered ships						
	1968	1971	1974	1975	1976	1977	1978	1968	1971	1974	1975	1976	1977	1978
by tonne-miles	thousand million tonne-miles							percentage of tonne-miles						
Dry cargo	82	89	93	90	88	100	102	66	55	49	45	42	36	34
Bulk	8	9	17	17	16	19	22	29	31	37	31	33	29	24
Other	74	80	76	72	72	80	80	70	58	52	49	44	38	36
Tanker cargo	18	16	15	14	20	36	45	49	47	43	44	33	29	18
All cargo	100	105	108	104	108	136	147	63	54	48	45	40	35	29
by weight	weight: million tonnes							percentage of weight						
Dry cargo	26	32	38	36	36	40	44	42	42	45	45	46	44	43
Bulk	8	10	16	16	14	17	20	33	41	48	47	52	49	46
Other	19	22	22	20	22	24	24	46	42	43	44	42	40	39
Tanker cargo	15	18	16	15	20	30	37	51	48	43	48	43	35	29
All cargo	41	50	54	51	56	70	81	45	44	44	46	45	40	37
by value	value: £ million							percentage by value						
Dry cargo	4 911	7 156	12 194	14 789	18 787	22 983	25 636	56	51	51	52	49	47	46
Bulk	61	64	258	383	342	472	668	19	30	30	33	34	32	30
Other	4 851	7 092	11 936	14 405	18 446	22 511	24 968	56	52	51	52	49	47	46
Tanker cargo	140	195	704	708	1 156	1 969	2 210	52	48	45	50	44	37	31
All cargo	5 051	7 351	12 899	15 497	19 943	24 953	27 846	55	51	51	52	49	46	45

Table 2 **Principal flags of vessels carrying UK seaborne trade 1976-78**

percentage

	All cargo						Dry cargo						Tanker cargo					
	Weight			Value			Weight			Value			Weight			Value		
Flag	1976	1977	1978	1976	1977	1978	1976	1977	1978	1976	1977	1978	1976	1977	1978	1976	1977	1978
Imports																		
United Kingdom	31.6	32.9	29.5	41.2	41.9	41.2	32.8	34.0	30.0	44.0	44.1	43.3	30.7	31.9	29.0	31.0	31.7	28.7
Liberia	17.1	14.8	13.4	5.8	4.7	3.4	10.8	7.2	7.4	1.6	1.3	0.9	22.1	21.9	19.2	21.0	20.8	18.1
Norway	9.1	9.2	8.7	5.1	4.7	4.6	11.2	9.8	8.7	4.4	3.8	3.8	7.5	8.6	8.6	7.8	9.1	9.2
Germany (Federal Republic)	6.4	6.5	6.2	10.2	10.2	10.0	9.8	10.3	10.6	12.0	11.7	11.3	3.6	3.0	1.9	3.8	3.3	2.6
Netherlands	5.6	4.5	5.1	6.1	5.4	5.4	6.1	5.9	6.1	6.2	5.7	5.5	5.3	3.1	4.3	5.7	3.7	4.8
France	4.6	3.7	4.4	4.8	4.9	5.9	2.3	2.4	2.7	4.4	5.0	5.9	6.4	4.9	6.0	6.2	4.7	5.6
Greece	4.6	5.2	7.6	2.2	2.0	2.4	5.4	6.4	8.0	1.8	1.7	1.6	3.9	4.0	7.2	3.8	3.7	6.8
Other EEC[1]	3.9	4.3	4.7	6.2	6.7	8.3	4.4	4.7	5.5	6.9	7.2	9.0	3.5	4.0	4.0	3.4	4.0	4.1
All other flags	17.1	18.9	20.4	18.4	19.5	18.8	17.2	19.3	21.0	18.7	19.5	18.7	17.0	18.6	19.8	17.3	19.0	20.1
Exports																		
United Kingdom	45.1	40.1	36.5	48.8	45.9	44.8	46.1	44.1	42.6	49.1	46.7	45.9	43.1	34.8	29.4	44.0	36.8	31.5
Germany (Federal Republic)	8.4	8.8	9.8	9.0	9.6	10.1	11.5	12.0	11.7	9.3	9.9	10.3	2.7	4.6	7.6	3.7	5.5	7.9
Norway	6.0	6.9	6.1	3.1	3.2	3.4	5.6	5.8	5.0	2.9	2.8	3.1	6.7	8.4	7.5	6.3	8.1	7.1
Greece	6.0	4.8	8.0	2.6	2.5	3.1	2.4	3.4	5.0	2.1	2.1	2.5	12.5	6.8	11.6	11.3	6.5	10.9
Netherlands	5.9	4.9	4.6	5.5	5.4	4.8	7.9	7.4	7.6	5.7	5.7	5.1	2.3	1.6	0.9	2.5	1.7	1.1
Denmark	3.5	2.8	2.7	3.4	3.6	3.5	3.7	3.6	3.3	3.4	3.7	3.6	3.3	1.8	2.0	3.5	1.9	2.2
Other EEC[2]	5.8	8.5	10.1	7.3	8.7	9.6	5.3	5.4	7.1	7.5	8.5	9.3	7.1	12.7	13.7	6.0	11.4	12.9
All other flags	19.3	23.2	22.2	20.3	21.1	20.7	17.5	18.3	17.7	20.0	20.6	20.2	22.3	29.3	27.3	22.7	28.1	26.4

[1] Belgium, Luxembourg, Italy, Republic of Ireland and Demark. [2]Belgium, Luxembourg, Italy, Republic of Ireland and France.

Table 2a **Principal flags of vessels carrying UK seaborne trade 1976-78**

percentage

	Other dry cargo						Dry bulk cargo						Total dry cargo					
	Weight			Value			Weight			Value			Weight			Value		
Flag	1976	1977	1978	1976	1977	1978	1976	1977	1978	1976	1977	1978	1976	1977	1978	1976	1977	1978
Imports																		
United Kingdom	38.0	38.1	37.2	47.1	46.6	45.5	30.0	31.6	25.3	29.2	30.0	27.8	32.8	34.0	30.0	44.0	44.1	43.3
Liberia	1.4	1.3	0.9	0.5	0.6	0.4	16.0	10.8	11.6	6.8	4.9	4.6	10.8	7.2	7.4	1.6	1.3	0.9
Norway	5.9	5.5	5.4	3.2	2.9	3.3	14.1	12.4	10.8	9.9	8.8	7.1	11.2	9.8	8.7	4.4	3.8	3.8
Germany (Federal Republic)	13.3	13.4	12.9	12.0	11.4	11.0	7.9	8.4	9.1	12.0	13.0	13.0	9.8	10.3	10.6	12.0	11.7	11.3
Netherlands	8.7	7.4	7.6	6.3	5.7	5.4	4.7	5.0	5.1	5.6	5.9	6.0	6.1	5.9	6.1	6.2	5.7	5.5
France	4.0	4.5	5.0	5.1	5.7	6.6	1.4	1.1	1.2	1.3	1.0	1.1	2.3	2.4	2.7	4.4	5.0	5.9
Greece	2.4	2.4	2.7	0.7	0.7	0.7	7.0	8.9	11.5	7.1	7.3	8.4	5.4	6.4	8.0	1.8	1.7	1.6
Other EEC [1]	7.0	7.3	8.5	7.5	7.8	9.6	3.0	3.2	3.5	4.1	4.2	4.6	4.4	4.7	5.5	6.9	7.2	9.0
All other flags	19.3	20.1	19.8	17.6	18.6	17.5	15.9	18.6	21.9	24.0	24.9	27.4	17.2	19.3	21.0	18.7	19.5	18.7
Exports																		
United Kingdom	42.1	40.2	39.4	49.3	47.0	46.4	52.3	49.5	46.5	34.1	32.0	29.5	46.1	44.1	42.6	49.1	46.7	45.9
Germany (Federal Republic)	10.5	10.8	10.4	9.2	9.7	10.0	13.0	13.7	13.3	16.2	18.9	20.4	11.5	12.0	11.7	9.3	9.9	10.3
Norway	4.4	4.2	4.2	2.9	2.7	3.7	7.3	8.1	6.0	7.3	7.0	5.4	5.6	5.8	5.0	2.9	2.8	3.1
Greece	3.1	3.4	4.2	2.1	2.1	2.4	1.3	3.3	5.9	2.3	3.0	5.1	2.4	3.4	5.0	2.1	2.1	2.5
Netherlands	8 8	8.4	8.4	5.6	5.6	5.0	6.4	6.0	6.8	9.3	9.3	10.1	7.9	7.4	7.6	5.7	5.7	5.1
Denmark	3.9	4.0	3.9	3.4	3.7	3.6	3.2	2.9	2.6	5.2	4.4	3.5	3.7	3.6	3.3	3.4	3.7	3.6
Other EEC [2]	6.5	6.7	7.5	7.5	8.5	9.4	3.5	3.7	6.6	5.2	5.3	6.7	5.3	5.4	7.1	7.5	8.5	9.3
All other flags	20.7	22.3	22.0	20.0	20.7	20.2	13.0	12.8	12.3	20.4	20.1	19.3	17.5	18.3	17.7	20.0	20.6	20.2

[1] Belgium, Luxembourg, Italy, Republic of Ireland and Denmark. [2] Belgium, Luxembourg, Italy, Republic of Ireland and France.

Tanker cargoes

Tanker cargoes are those which are carried in bulk liquid form. Examples of these are crude petroleum (which is by far the largest), petroleum products, and other minor cargoes such as molasses and sulphuric acid.

Imports. Tanker imports in 1978 accounted for 68 per cent of UK imports by sea in terms of tonne-miles, but only 15 per cent by value. There was a further fall of 4 per cent in the weight of tanker cargoes imported by sea due to the reduced imports of crude petroleum.

The UK flag share fell to 29 per cent by weight in 1978. The other principal carriers of tanker cargoes to the UK are Liberia and Norway with 19 per cent and 9 per cent, respectively.

Exports. Tanker export cargoes, by weight, increased by 23 per cent in 1978 because of the continuing rise in exports of crude petroleum and its products. The UK flag share by weight continued to decline from 34 per cent in 1977 to 29 per cent in 1978 although in 1978 this was actually more cargo. The UK flag share by tonne-miles is much lower, 18 per cent in 1978, and reflects the fact that UK tankers carry only a small percentage of our petroleum exports to the USA and the West Indies. Greece with 12 per cent and the Federal Republic of Germany with 8 per cent were the next most important carriers.

Dry bulk cargoes

The distinction between dry bulk cargoes and other dry is not easy to make and this is actually done by classifying certain commodities as being 'bulk'. Only the principal dry bulk commodities are distinguished; examples of these are raw sugar, coniferous lumber, fertilisers, iron ore, non-ferrous ores and coal.

Imports. Iron ore and unmilled cereals between them accounted for almost half of all dry bulk cargo imports in 1978; the other principal commodities were crude fertilisers and coniferous lumber. The weight of iron ore imported in 1978 was slightly less than in 1977; seaborne imports of unmilled cereals showed a 27 per cent decrease. Overall seaborne imports of dry bulk cargoes fell by 4 per cent in weight terms. The UK flag share decreased from 31 per cent in 1977 to 25 per cent in 1978. Liberia with 12 per cent and Greece and Norway each with 11 per cent were the other principal carriers of dry bulk cargoes.

Exports. Dry bulk cargoes, which only accounted for 24 per cent of seaborne exports by weight and 2 per cent by value, increased in weight terms by 18 per cent in 1978. The principal dry bulk cargoes which are exported are crude fertilisers and coal; these are sent mainly to the EEC and Scandinavia and together these two commodities accounted for 68 per cent of the total. The UK flag share declined from 49 per cent in 1977 to 46 per cent. The other principal carriers were the Federal Republic of Germany (13 per cent) and the Netherlands (7 per cent).

Other dry cargoes

Other dry cargoes are all those not included as tanker or dry bulk cargoes. They therefore include food and drink, semi-manufactured and manufactured goods.

Imports. The weight of other dry cargo imported by sea increased by 5 per cent in 1978, but in terms of tonne-miles remained almost constant. The UK flag share in weight terms fell from 38 per cent to 37 per cent. The Federal Republic of Germany with 13 per cent and the Netherlands with 8 per cent are the most important foreign flag carriers of other dry imports.

Exports. Seaborne exports of other dry cargo increased by 2 per cent in terms of weight but fell slightly in terms of tonne-miles. The UK flag share declined in weight terms from 40 to 39 per cent and in tonne-mile terms from 38 to

UK seaborne trade by value, weight, area and flag share 1978

By value

Imports	£ million	Exports	£ million
EEC	7046.7	EEC	5935.5
	3239.8		2101.5
	3968.2		3057.8
Scandinavia and Baltic		Scandinavia and Baltic	
	481.9		635.8
	1912.0		1199.3
	859.2		791.4
Iberia and Mediterranean		Iberia and Mediterranean	
	1149.3		1310.9
	165.0		285.3
	1105.4		1197.3
West and Central Africa		West and Central Africa	
	131.3		427.8
	130.7		115.3
	238.7		686.3
South and East Africa		South and East Africa	
	297.5		469.1
	75.5		153.1
	419.7		396.6
The Gulf and Indian Ocean		The Gulf and Indian Ocean	
	910.3		842.0
	170.0		447.2
	1874.8		1372.7
Far East		Far East	
	686.6		577.2
	455.8		234.5
	1250.9		674.9
Australasia		Australasia	
	526.2		563.5
	44.1		113.0
	230.0		276.5
North America		North America	
	1305.9		1203.9
	330.8		227.8
	1616.5		1355.5
South and Central America		South and Central America	
	344.3		352.9
	146.2		186.8
	231.3		224.3
West Indies		West Indies	
	147.6		148.9
	4.0		1.3
	132.4		280.3

By weight

Imports	'000 tonnes	Exports	'000 tonnes
EEC	14951.7	EEC	21205.6
	6208.9		5557.3
	14951.0		17268.3
Scandinavia and Baltic		Scandinavia and Baltic	
	2841.6		2387.4
	10674.9		2429.0
	7238.5		7127.7
Iberia and Mediterranean		Iberia and Mediterranean	
	2180.7		1178.8
	667.5		803.6
	6851.7		2702.0
West and Central Africa		West and Central Africa	
	767.7		620.9
	107.1		154.4
	3388.4		1826.9
South and East Africa		South and East Africa	
	1050.7		361.8
	163.1		105.1
	3002.3		410.1
The Gulf and Indian Ocean		The Gulf and Indian Ocean	
	14861.3		706.3
	899.7		361.6
	33530.1		1436.6
Far East		Far East	
	502.8		485.2
	410.6		191.7
	1194.1		774.3
Australasia		Australasia	
	1656.8		397.7
	93.5		69.3
	2477.5		235.2
North America		North America	
	4580.3		1321.1
	391.1		544.5
	10397.9		5809.4
South and Central America		South and Central America	
	1598.6		289.8
	199.3		134.0
	5374.5		547.9
West Indies		West Indies	
	804.0		616.4
	17.0		1.2
	1218.2		2893.0

36 per cent. As with imports the Federal Republic of Germany (10 per cent) and the Netherlands (8 per cent) are the principal foreign flags involved in carrying dry cargo exports.

Graph 1 shows the UK flag share combined for imports and exports in terms of weight, tonne-miles and value. It is significant to note the almost constant figure in terms of weight and the continuing decline in terms of tonne-miles.

Trade carried by flag

The proportion by weight and value of UK seaborne imports and exports carried by the flags whose share is significant are shown in tables 2 and 2a. Among the principal world fleets only Japan's carrying is not sufficiently large to be separately identified. The bar chart shows separately for imports and exports, by weight and value, the UK flag share of UK seaborne trade with various country group areas.

Business Monitor MA8

A full analysis of the seaborne trade of the United Kingdom appears in Business Monitor MA8, with the same title as this article. It is published annually and gives a detailed breakdown of UK sea trade by country, flag, average lengths of haul and individual commodity trades. The latest monitor, with 1978 figures, will be available in July, and can be obtained from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH. Copies can also be obtained over the counter at the Department of Trade's Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4M 7MU.

Notes

A full list of notes and definitions can be found in the Business Monitor. Dry bulk, other dry and tanker cargoes are described, in detail, in terms of commodities in the Business Monitor.

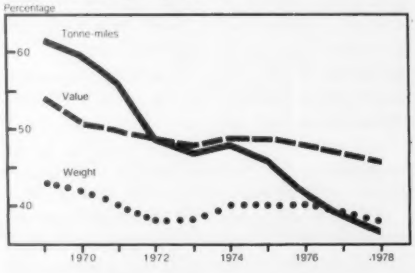
The seaborne trade statistics cover the same field as the overseas trade statistics but exclude the following categories of trade: oil in pipeline; electric energy; parcel post; low value trade; non-monetary gold; other transactions and commodities not classified according to kind; ships, boats and production platforms; trade by air; and trade across the Irish land boundary.

Imports are valued cif and exports fob.

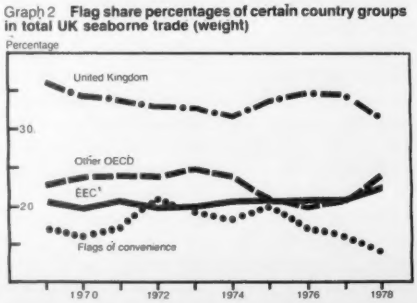
Any measure of the share of UK trade carried by UK ships is not the same as that carried by the UK shipping industry since the latter would include foreign ships chartered in by UK shipping companies and exclude UK ships chartered out to foreign shipping companies.

More detailed information about seaborne trade than that available in the Business Monitor is obtainable from the department at the telephone number given at the end of this article or the Controller, Statistical Office, HM Customs and Excise, Portcullis House, 27 Victoria Avenue, Southend-on-Sea, Essex SS2 6AL, from whom information on all UK trade is also available. Analysis of UK trade by port can be found in the National Ports Council's annual publication, Digest of Port Statistics. **Inquiries:** 01-212 6960.

Graph 1 **United Kingdom percentage flag share of United Kingdom other dry cargo trade**



Graph 2 **Flag share percentages of certain country groups in total UK seaborne trade (weight)**



¹EEC countries other than United Kingdom

Textiles and clothing trade balance deteriorates in first quarter

Home demand (table 1)
Consumers' expenditure on clothing fell back only slightly in the first quarter of this year from the high level reached in the second half of 1978 despite the deterrent effect of severe weather and of transport difficulties. Consumers' expenditure on household textiles was also buoyant and very nearly reached the record level of the third quarter of 1978. However, it is clear from the output figures and the trade figures that imports continue to increase their share of the home market for textile and clothing goods.

In the financial statement and budget report, the Treasury forecast little if any increase in consumer spending over the next year.

Output (table 2)
Output in the textile industry dropped sharply in the first quarter of 1979. With the industrial problems in January and February having a significant effect, it was 4 per cent lower than in the previous quarter. All of the major sectors shared in this fall except for cotton and man-made fibre weaving, the output of which reached its highest level since mid 1977. Worst affected were man-made fibres, 13 per cent lower than in the fourth quarter of 1978, and cotton system spinning and carpets, both 7 per cent lower.

It is estimated from provisional figures that deliveries of made-up clothing remained at a high level in the first quarter of 1979 despite a fall in exports. With the continued strength of sterling putting pressure on export margins, and the home market forecast to be less buoyant, the industry will have difficulty maintaining the good growth shown over the past two years. Optimism over the short term continues to be expressed by respondents to the CBI/NEDO survey of trends in textiles and clothing.

Wholesale prices (table 5)
Output prices in the textile industry were over 3 per cent higher in the first quarter of 1979 than in the fourth quarter of 1978, the largest quarterly increase for two years, and were 9 per cent higher than a year previously. Although rises continue to be generally higher in the downstream sectors of knitting, carpets and made-up clothing, cloth of filament yarn showed an increase of 3½ per cent. The rate of increase in the price index of materials and fuel purchased by textile industries also accelerated in the first quarter of 1979. The price of man-made fibres rose by 2½ per cent and the latest information available indicates a large increase in the second quarter of this year, attributable mainly to the higher price of oil.

The price of raw cotton which increased quite sharply during 1978 fell in the first quarter of 1979. Wool prices rose in the early part of this year but have since stabilised. Both of these commodities, being largely imported, are affected by fluctuations in the value of sterling, and the recent strength of sterling will have had a dampening effect on prices.

Employment in textiles and clothing (table 6)
Employment in textiles in Great Britain fell by nearly 4000 between December 1978 and March 1979, when it was 13 000 lower than in March 1978. The major part of the reduction in the first quarter of this year occured in the woollen and worsted and hosiery and other knitted goods sectors, with falls of 1800 and 1000 respectively. Against the trend employment in carpets rose by 500 nearly reaching the level of a year previously.

The increase in employment in the clothing industry which occurred towards the end of last year was thrown into reverse by a fall of 600 between December and March, when total employment was 1800 less than at March 1978.

Overseas trade (table 7)
As detailed trade figures for the first quarter of 1979 are not yet available, tables 8, 9 and 10 have not been reproduced in this article. However, aggregate figures are available at the division level and they appear in table 7. The trade figures for this year have been affected by the impact of the road haulage dispute. This is particularly true for exports. On the assumption that textiles and clothing conform to the general pattern in this respect, it is likely that the figures discussed below present an over gloomy picture, and that the second quarter will show some improvement.

The crude trade balance for clothing (division 84) deteriorated sharply in the first quarter of 1979 to stand at a deficit of £137 million, the worst figure ever recorded. With exports showing no increase by value (a decrease in volume) and imports over 30 per cent higher by value, the deficit was almost twice as high as in the first quarter of 1978. The continuing high level of consumer spending on clothing and a loss in price competitiveness contributed towards the poor trade performance.

In textiles (division 65) the picture was equally gloomy. The trade deficit of £122 million was the worst on record. The value of exports fell by 3 per cent compared with the first quarter of 1978 whereas the value of imports rose by 22 per cent.

Inquiries: Department of Industry, Room 501, Dean Bradley House, 52 Horseferry Road, SW1P 2AG, tel. 01-212 6474.

Table 1 **Comparison of textile and clothing output with some factors affecting demand**

Index numbers 1975 = 100 (quarterly figures seasonally adjusted)

						1977			1978				1979	Growth rate per cent per annum	Growth per cent 12 months ended
	1974	1975	1976	1977	1978	2nd qtr	3rd qtr	4th qtr	1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	1974/78	Q1 1979/ Q1 1978
Gross domestic product at factor cost (expenditure based)	101.7	100.0	108.6	105.1	108.6	104.5	105.8	107.0	106.8	108.3	109.7	109.4	106.8	+1.7	+2.4
Consumer's expenditure															
All items	101.3	100.0	100.3	99.4	104.9	98.2	100.2	100.5	103.2	104.0	106.3	106.2	107.6	+0.9	+5.5
Clothing	99.1	100.0	100.0	102.4	112.1	99.6	104.0	104.4	107.4	108.7	115.8	116.6	114.8	+3.1	+9.7
Household textiles and soft furnishings	97.3	100.0	106.4	106.0	112.7	105.2	107.2	103.8	111.9	109.2	118.6	111.2	118.1	+3.7	+6.8
Output															
Total manufacturing	106.5	100.0	101.4	102.8	103.6	102.4	103.0	101.8	102.3	104.5	104.9	102.5	101.4	−0.7	+0.9
Textiles	105.9	100.0	103.0	100.9	99.3	100.1	100.3	98.0	97.0	100.1	101.3	99.0	95.2	−1.6	NIL
Clothing	98.7	100.0	96.6	103.0	104.3	102.2	103.8	103.8	100.9	103.6	108.7	105.7	105.5	+1.4	+3.1

Table 2 **Output**

Index numbers 1975 = 100 (quarterly figures seasonally adjusted)

	1968 MLH	Weights	1974	1975	1976	1977	1978	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr	Growth rate per cent per annum 1974/78	Growth per cent 12 months ended Q1 1979/ Q1 1978
Man-made fibres	411	11.8	110.8	100.0	109.6	97.7	104.9	102.4	96.7	84.9	99.7	104.3	103.6	112.2	97.4	−1.4	+8.8
Spinning and doubling on cotton system[1]	412	9.4	109.6	100.0	105.5	100.2	93.7	99.7	97.6	96.4	89.1	93.4	94.6	97.8	91.1	−3.8	−1.5
Weaving of cotton and man-made fibres[2] (part)	413	8.3	104.9	100.0	99.1	97.5	92.0	97.7	98.4	93.9	89.9	94.2	91.5	92.4	95.3	−3.2	−1.7
Woollen and worsted	414	16.6	113.2	100.0	101.5	104.7	101.1	103.8	102.3	103.6	100.2	100.4	104.5	99.5	96.7	−2.8	−2.1
Hosiery and other knitted goods	417	19.6	102.8	100.0	105.5	105.9	103.9	103.9	106.7	105.3	105.2	104.3	105.8	100.3	97.7	+0.3	−3.1
Carpets	419	9.3	103.4	100.0	99.9	92.5	93.2	86.8	92.4	93.2	92.4	95.5	95.6	89.4	83.5	−2.6	−0.2
(Order XIII)[3]		100.0	105.9	100.0	103.0	100.9	99.3	100.1	100.3	98.0	97.0	100.1	101.3	99.0	95.2	−1.6	NIL

[1] Including texturing of man-made continuous filament yarns. [2] Excludes linen. [3] In addition to sectors listed above includes jute, twine and net, lace, narrow fabrics, made-up textiles, textile finishing and other textiles industries. Their combined weight in the total index is 25.0 per cent.

Table 3 Production of man-made fibres

Million kg

	1972	1973	1974	1975	1976	1977	1978	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr	Growth rate per cent per annum 1972/78	Growth per cent 12 months ended Q1 1979/ Q1 1978
Staple fibre																	
Synthetic	177	221	196	178	214	182	227	51	42	36	55	62	52	58	55	+4.2	+23.4
Viscose and acetate	185	204	160	138	134	130	140	36	34	26	35	32	33	40	35	−4.5	+6.9
Total	332	425	356	316	348	312	367	87	76	62	90	94	85	98	90	+0.2	+16.5
Continuous filament yarn																	
Synthetic	196	233	200	185	200	177	181	48	41	39	45	47	42	47	43	−1.3	+3.5
Viscose and acetate	68	73	72	63	71	62	60	16	14	14	16	15	15	14	15	−2.1	−1.7
Total	264	306	272	248	271	239	241	64	55	53	61	62	57	61	58	−1.5	+2.1
All man-made fibres																	
Synthetic	373	454	396	363	414	359	408	99	83	75	100	109	94	105	98	+1.5	+13.7
Viscose and acetate	253	277	232	201	205	192	200	52	48	40	51	47	48	54	50	−3.8	+4.2
Total	626	731	628	564	619	551	608	151	131	115	151	156	142	159	148	−0.5	+10.4

Table 4 Consumption of fibres

Million kg

	1972	1973	1974	1975	1976	1977	1978	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr	Growth rate per cent per annum 1972/78	Growth per cent 12 months ended Q1 1979/ Q1 1978
In cotton spinning																	
Raw cotton	129	126	111	103	113	104	97	25	23	25	25	24	23	25	26	−4.6	NIL
Man-made staple fibre																	
Rayon	32	36	39	30	27	30	27	8	6	7	6	7	7	7	8	−2.8	+7.4
Other	34	37	30	30	38	39	41	9	9	10	10	10	10	11	11	+3.2	+10.5
In top making, wool spinning and felting																	
Wool and animal hair	165	149	121	122	134	126	122	33	27	30	33	32	27	30	32	−4.9	−1.6
Man-made staple fibre	86	105	103	86	87	85	84	22	19	21	21	21	20	22	20	−0.4	NIL

Table 5 Wholesale prices

Index numbers 1975 = 100

	1975	1976	1977	1978	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr
Output (home sales)												
All manufactured products	100.0	117.3	140.5	153.3	139.5	143.8	145.8	149.2	151.8	154.8	157.4	161.6
Textile industries	100.0	115.3	135.6	147.2	135.0	136.6	139.0	143.0	145.5	148.9	151.2	155.9
Man-made continuous filament yarn cloth in the loom state	100.0	109.1	124.0	132.3	123.8	125.8	127.2	129.0	132.1	133.3	134.8	139.6
Cotton cloth in the loom state	100.0	117.6	140.1	143.6	142.4	141.8	139.5	139.7	142.3	144.5	147.8	149.8
Worsted cloth	100.0	119.2	141.9	148.1	141.5	142.5	144.3	145.0	148.1	149.1	150.0	151.1
Socks, stockings and tights (including pantihose)	100.0	106.7	119.5	133.4	117.1	122.0	123.4	129.2	130.9	135.4	138.2	145.5
Carpets	100.0	115.7	134.7	149.7	134.1	135.8	139.2	145.8	147.0	151.7	154.3	159.0
Made-up clothing	100.0	113.0	127.6	141.5	125.3	129.0	132.5	137.0	139.3	142.9	146.7	150.4
Materials and fuel purchased												
Textile industries	100.0	124.2	142.1	145.7	143.2	143.5	141.3	140.8	145.4	146.1	149.6	154.1
Commodities wholly or mainly imported												
Raw cotton	100.0	181.0	171.5	159.1	192.2	154.5	137.5	145.8	163.1	160.2	167.4	160.4
Raw wool	100.0	146.3	160.0	149.4	161.0	156.7	152.9	140.9	153.4	152.5	150.8	155.9
Man-made fibres	100.0	111.3	125.0	127.7	125.4	125.5	126.1	126.5	127.1	128.4	128.8	131.9

Table 6 Employment in textiles and clothing [1]

Thousands

	MLH	1977 June	1977 September	1977 December	1978 March	1978 June	1978 September	1978 December	1979 March
Great Britain									
Textiles	411-429	484.4	478.5	474.7	468.3	464.2	460.6	459.1	455.2
Production of man-made fibres	411	32.6	32.1	31.1	30.7	30.5	30.6	30.5	30.5
Spinning and doubling on the cotton and flax systems	412	51.0	49.7	49.3	48.2	46.9	45.9	46.0	45.2
Weaving of cotton, linen and man-made fibres	413	39.5	39.2	38.8	37.6	37.2	36.9	36.9	36.8
Woollen and worsted	414	82.2	81.9	80.3	79.6	79.5	78.3	77.1	75.5
Hosiery and other knitted goods	417	119.1	117.7	118.2	116.3	114.6	114.2	113.3	112.3
Carpets	419	34.7	33.8	33.4	32.7	32.5	32.3	32.1	32.6
Textile finishing	423	46.8	46.4	46.8	46.2	45.8	45.3	45.9	45.7
Clothing	441-449	297.1	293.6	292.9	290.5	289.8	288.3	289.3	288.7

[1] Employees in employment at middle of each month.

Table 7 Crude trade balance[1]

£ million at current prices

	1972	1973	1974	1975	1976	1977	1978	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	1978 4th qtr	1979 1st qtr
Textile fibres (division 26)															
Exports	108.1	172.1	201.8	183.5	260.6	308.2	282.2	81.6	67.9	66.1	62.8	75.2	66.2	78.0	68.5
Imports	213.7	322.4	310.5	263.4	438.3	467.3	480.3	127.5	95.0	104.2	129.5	142.0	110.0	98.8	120.8
Balance	−105.6	−150.3	−108.7	−79.9	−177.7	−159.1	−198.1	−45.9	−27.1	−38.1	−66.7	−66.8	−43.8	−20.8	−52.3
Textile yarns, fabrics, etc (division 65)															
Exports	445.4	589.5	745.8	698.2	934.2	1 147.0	1 237.7	292.2	280.5	286.6	303.4	316.2	287.2	330.9	294.5
Imports	369.7	514.9	688.2	682.8	911.4	1 118.7	1 455.2	274.8	270.2	284.8	342.4	361.9	351.9	399.0	416.9
Balance	+75.7	+74.6	+57.6	+15.4	+22.8	+28.3	−217.5	+17.4	+10.3	+1.8	−39.0	−45.7	−64.7	−68.1	−122.4
Clothing (division 84)															
Exports	144.3	179.6	230.0	265.5	412.3	598.0	670.0	126.9	172.8	179.1	144.7	150.1	184.2	191.0	144.5
Imports	218.8	333.6	402.4	505.1	683.8	766.6	920.7	177.0	199.5	188.6	215.0	204.6	252.4	248.7	281.5
Balance	−74.5	−154.0	−172.4	−239.6	−271.5	−168.6	−250.7	−50.1	−26.7	−9.5	−70.3	−54.5	−68.2	−57.7	−137.0

[1] Imports cif, exports fob.

Made-up clothing: orders and deliveries in March

In the three months ended March 1979, deliveries by the clothing industry were provisionally estimated to have been 4 per cent lower than in the preceding three months while net new orders were 1 per cent lower. Orders-on-hand at the end of March 1979 were 7 per cent higher than the end December 1978. (These comparisons are based on the seasonally adjusted series in the accompanying table.)

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years.

All indices have been rebased from 1970 = 100 to 1975 = 100.

Inquiries: Department of Industry, Room 524, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 0116.

Made-up clothing
Index numbers of total orders and deliveries

	Orders-on-hand (end period)		Net new orders		Deliveries	
	December 1974 = 100		Average 1975 Deliveries = 100		Average 1975 Deliveries = 100	
1973	110		108		102	
1974	100		100		100	
1975	98		103		100	
1976	92		102		98	
1977	96		107		104	
1978	102		109		106	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1976						
1st qtr	90	93	96	97	99	98
2nd	114	104	113	105	96	99
3rd	87	93	87	102	98	97
4th	92	91	110	102	101	98
1977						
1st qtr	101	105	110	110	105	104
2nd	108	99	107	99	100	104
3rd	91	97	97	111	104	103
4th	96	94	113	107	107	106
1978						
1st qtr	93	95	104	107	103	104
2nd	113	102	117	106	103	106
3rd	98	107	95	110	108	108
4th p	105	106	119	116	111	110
1979						
1st qtr p	111	113	115	115	109	105
1977						
Jan	99	102	98	113	93	104
Feb	98	103	110	106	111	105
Mar	101	105	121	110	111	102
Apr	106	104	115	105	100	104
May	113	100	118	89	101	102
Jun	108	99	87	104	99	107
Jul	97	96	94	119	105	105
Aug	91	96	82	109	93	102
Sep	91	97	116	105	115	101
Oct	91	95	126	98	123	104
Nov	95	94	116	97	107	101
Dec	96	94	97	126	91	112
1978						
Jan	93	95	88	103	91	101
Feb	90	94	108	106	110	103
Mar	93	95	115	112	108	107
Apr	106	102	134	110	112	106
May	119	103	125	106	96	107
Jun	113	102	88	101	102	105
Jul	106	106	93	113	110	111
Aug	99	107	76	106	94	105
Sep	98	107	117	112	119	108
Oct p	101	107	131	105	122	104
Nov p	104	105	130	114	118	113
Dec p	105	106	97	129	94	113
1979						
Jan p	105	108	93	108	89	98
Feb p	104	109	115	114	114	107
Mar p	111	113	138	123	123	111

p Provisional.

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977 the register was noted 'licences of right' in respect of the following patents on the dates specified:

18 June 1979
1170918 Daimler-Benz Aktiengesellschaft
Improvements relating to collapsible steering shaft arrangements for motor vehicles
1198350 Daimler-Benz Aktiengesellschaft
Improvements relating to rear axle suspensions
1215166 Daimler-Benz Aktiengesellschaft
Improvements relating to motor vehicles
1235882 Daimler-Benz Aktiengesellschaft
Safety steering wheel for motor vehicles
1242586 Daimler-Benz Aktiengesellschaft
A lock incorporating a device for verifying the locking position of the lock
1276609 Daimler-Benz Aktiengesellschaft
Brake discs for disc brakes
1308355 Daimler-Benz Aktiengesellschaft
Improvements relating to heat engines
1418548 Daimler-Benz Aktiengesellschaft
Display unit
1415040 Poclain Hydraulics
Improvements in and relating to the supply of hydraulic fluid to utilization circuits
1425820 Poclain Hydraulics
Imrpovements in and relating to a device for feeding fluid
1262909 The Electricity Council
Imrpovements in or relating to variable ratio transmission systems
1306249 Nissan Motor Company Ltd
Line pressure control system for automatic power transmission
1307584 Societe Anonyme Automobiles Citroen
An improved assembly comprising a member and a support therefor
1430885 Laboratorie L Lafon
Process for preparing a purified extract of Quillaia Bark
1517290 N. Kettle Ltd
Counting aid for tablets and the like

And person who claims that the proprietor of the patent is, and was at the time of entry, precluded by a contract in which the claimant is interested from granting licences under the patent may, within three months after the making of the relevant entry, apply to the Comptroller on patents form 31/77 for cancellation of the entry.

I. J. G. Davis, Comptroller

Films and television material: overseas transactions in 1978

This article presents the results of the Department of Trade's annual inquiry into overseas transactions by film and television companies relating to the production and exhibition of cinematograph film and television material in 1978. The scope and coverage of the inquiry were identical with those of previous inquiries in the series, the last of which was reported in *Trade and Industry*, 25 August 1978.

Receipts from overseas, net of overseas expenditure, of film and television companies from the production and exhibition of cinematograph film and television material increased from £29 million in 1977 to £34 million in 1978. Receipts rose by £20 million between 1977 and 1978 to £94 million mainly because film companies increased their receipts by nearly 50 per cent. Expenditure overseas rose by £15 million to £60 million in 1978.

Film companies

Film companies receipts from overseas rose from £38 million in 1977 to £56 million in 1978. This large increase resulted from a rise of £11 million in receipts for performances overseas and partly by a substantial increase of £7 million in overseas receipts for the production of films in the United Kingdom for overseas residents. A broad geographical analysis of film companies' overseas transactions from 1974 to 1978 is given in table 2, with table 3 providing a division between those for performances and those for production for each area in 1977 and 1978.

The bulk of the increase in receipts in 1978 was from north America where, at £26 million, receipts were more than double those in 1977 with the increase shared more or less equally between production and performances. Apart from the EEC, all the other main areas showed a small increase in receipts almost entirely from payments received for performances overseas. North America also accounted for virtually all of the increase in overseas expenditure by UK film companies with expenditure of £25 million in 1978, £8 million higher than in 1977. Payments to the EEC also increased, by £1 million, but payments to all the other main areas were lower in 1978 than in 1977.

The overseas expenditure of UK film companies, as shown in table 4, is mainly by the UK subsidiaries of United States companies: they accounted for just over 70 per cent of expenditure in 1977 and 1978. This however is lower than in the early 1970s when they were responsible for 80 per cent of expenditure. On the other hand these subsidiaries now account only for around a quarter of the total receipts compared with two-thirds in the early 1970s.

Television companies

Overseas receipts of television companies between 1977 and 1978 increased by only £2 million to £38 million, after an increase of £17 million between 1976 and 1977. The increase in 1978 was achieved despite a fall of nearly £3 million in receipts from north America, but as shown by table 5, increases in receipts from all the other main areas more than offset the lower north American receipts. Overseas expenditure by television companies in 1978 was £24 million, just over £7 million higher than in 1977, the increase mainly as a result of higher expenditure in north America. Transactions with north America, the most important area for television companies, accounted for just over 45 per cent of receipts in 1978 and just over 56 per cent of expenditure.

Notes and definitions

The statistics cover the value of transactions between the United Kingdom and overseas residents in respect of the production and performance in cinemas or on television of films of any width and recordings on tape or any other

Table 1 **Overseas transactions in respect of film and television material** £ million

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
Receipts [1]											
Film companies [2]	44.5	40.7	26.7	34.0	28.4	22.8	22.5	32.5	35.7	38.3	55.7
Television companies [3]	5.1	6.9	5.7	10.6	9.1	10.1	10.4	12.6	18.4	35.7	38.0
Total	49.6	47.6	32.4	44.6	37.5	32.9	32.9	45.1	54.1	74.0	93.7
Expenditure [4]											
Film companies [2]	21.4	26.8	15.3	19.4	20.0	20.9	22.1	27.8	29.6	28.3	35.6
Television companies [3]	4.1	5.2	4.8	4.9	5.0	7.7	9.1	10.8	17.6	16.9	24.1
Total	25.5	32.0	20.1	24.3	25.0	28.6	31.2	38.6	47.2	45.2	59.7
Receipts less expenditure											
Film companies [2]	23.1	13.9	11.4	14.6	8.4	1.9	0.4	4.7	6.1	10.0	20.1
Television companies [3]	1.0	1.7	0.9	5.7	4.1	2.4	1.3	1.8	0.8	18.8	13.9
Total	24.1	15.6	12.3	20.3	12.5	4.3	1.7	6.5	6.9	28.8	34.0

[1] Sums receivable from overseas residents. [2] Includes transactions by film companies in respect of rights restricted to television. [3] Includes transactions in respect of BBC sound broadcasting and Independent Television News. [4] Sums payable to overseas residents.

Table 2 **Overseas transactions in respect of film companies [2]: analysis by area** £ million

	1974	1975	1976	1977 [4]	1977 [5]	1978
Receipts [1]						
EEC	4.5	5.6	7.7	8.5	8.5	8.4
Other western Europe	2.1	1.8	2.3	3.8	3.8	4.3
North America	8.6	16.2	14.0	11.6	11.6	26.4
Other developed countries [3]	—	—	—	—	4.9	5.9
Overseas sterling countries [4]	4.9	6.5	—	8.5	—	—
Rest of the world [5]	2.4	2.4	11.7	5.9	9.5	10.7
Total	22.5	32.5	35.7	38.3	38.3	55.7
Of which receipts in respect of rights restricted to television	1.7	1.6	3.0	3.6	3.6	2.2
Expenditure [4]						
EEC	5.9	5.4	8.9	6.8	6.8	7.6
Other western Europe	1.0	1.5	2.8	2.0	2.0	1.0
North America	13.5	16.9	14.9	17.8	17.8	25.5
Other developed countries [3]	—	—	—	—	0.5	0.3
Overseas sterling countries [4]	0.9	2.3	—	1.0	—	—
Rest of the world [5]	0.8	1.7	3.0	0.7	1.2	1.2
Total	22.1	27.8	29.6	28.3	28.3	35.6

[1] [2] [4] See table 1. [3] Other developed countries are: Australia, Japan, New Zealand and South Africa. Prior to 1977 Japan was included with rest of the world while the other three countries were included with overseas sterling countries. In 1977 figures were collected on both bases.

Table 3 **Overseas transactions in respect of film companies [2]: analysis by area and type of transaction** £ million

	1977						1978					
	Total	EEC	Other western Europe	North America	Other developed countries [3]	Rest of the world [5]	Total	EEC	Other western Europe	North America	Other developed countries [3]	Rest of the world [5]
Receipts [1]												
Performances in cinemas or on television	27.4	7.5	3.2	5.3	4.4	7.0	38.3	7.4	3.7	13.0	5.5	8.7
Production of films	10.9	1.0	0.6	6.3	0.5	2.5	17.4	1.0	0.7	13.3	0.5	1.9
Total	38.3	8.5	3.8	11.6	4.9	9.5	55.7	8.4	4.4	26.3	6.0	10.6
Expenditure [4]												
Performances in cinemas or on television	22.8	5.9	0.2	16.4	0.2	0.1	31.1	6.9	0.2	23.5	0.2	0.3
Production of films	5.5	0.9	1.8	1.4	0.3	1.1	4.5	0.8	0.8	2.0	0.2	0.7
Total	28.3	6.8	2.0	17.8	0.5	1.2	35.6	7.7	1.0	25.5	0.4	1.0

[1] [2] [4] [5] See tables 1 and 2.

media. Performances in cinemas or on television include the outright sales or purchases of films as well as receipts or payments for rentals. Production of films includes overseas receipts or payments for film processing, printing, editing etc, as well as sums for work on location. The returns from film companies include any overseas transactions they do on behalf of another producer, distributor or agent in the United Kingdom.

The statistics do not cover all the film companies' overseas transactions which affect the UK balance of payments since they do not include profits or capital transactions (except the provision of production finance). Transactions relating to the Army Kinema Corporation are excluded throughout. The basis of the register of the inquiry was described in detail in the *Board of Trade Journal*, 6 January 1967. This register is brought up to date annually using a list of producers and distributors who registered films with the Department of Trade. Some 142 film companies were approached in respect of 1978, and of these 24 reported no overseas transactions. Firms were asked to report figures for the calendar year 1978 where possible, although some firms provided figures for their nearest accounting year. Eight firms reported for an accounting year ending before 31 December 1978 and four companies for an accounting year ending after 31 December 1978.

Firms were asked to return amounts against the geographical area to which they were payable or from which they were receivable, irrespective of where they might have first been earned.

Transactions with overseas branches and with companies registered abroad were included as were debits to and credits from non-resident accounts. Receipts for production in the UK comprised amounts remitted from overseas or put up from amounts held in the UK on behalf of overseas residents, and sums applied to the repayment of loans raised in the UK. Amounts for film production including location work abroad, remitted from the UK or put up from amounts held overseas on behalf of UK residents, were included as debits.

Firms were asked to state separately the amounts receivable in respect of rights relating solely to television (see table 2); the corresponding payments for foreign films for television showing are thought to be small.

The figures reported by companies in this inquiry include some imports and exports of exposed cinematograph film recorded in the overseas trade accounts. However, the trade account figures for exposed cinematograph film include a number of items not covered by the inquiry, such as film flown in from units on location abroad for processing and immediate return to the unit abroad, and film imported and prints exported after processing by specialist film processing laboratories to the order of overseas customers. It is not possible to give an exact indication of the extent of the overlap, but the inquiry results probably include about half of the export figure in the overseas trade account and a rather higher proportion of the import figures. Excluding these imports and exports covered by the trade accounts, it is estimated that transactions by film and television companies contributed a net surplus of £25 million to the invisible account of the balance of payments in 1978 compared with a net surplus of £22 million in 1977

General

The tables give the information in as much detail as is practicable without disclosing the affairs of individual firms.

In the tables:

– means nil or less than half of final digit shown

. .means not available.

Inquiries: 01-215 3541.

Table 4 **Overseas transactions in respect of film companies [2]: analysis by type of transaction and category of company**

£ million

	1977			1978		
	All firms	United Kingdom subsidiaries of the major United States film companies	Other firms	All firms	United Kingdom subsidiaries of the major United States film companies	Other firms
Receipts [1]						
Performances in cinemas or on television	27.4	6.2	21.2	38.3	5.5	32.8
Production of films, etc	10.9	4.3	6.6	17.4	8.5	8.9
Total	38.3	10.5	27.8	55.7	14.0	41.7
Expenditure [4]						
Performances in cinemas or on television	22.8	19.7	3.1	31.1	25.6	5.5
Production of films, etc	5.5	0.4	5.1	4.5	0.3	4.2
Total	28.3	20.1	8.2	35.6	25.9	9.7

[1] [2] [4] See table 1.

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British Film Fund Agency returns

The British Film Fund Agency has authorised the publication of the following information for the four weeks ended 26 May:

	£
Distributors' earnings submitted	
Low cost films:	
Eligible (after multiplying by 2½)	64 917
Not eligible for 2½ times rental	68 875
	133 792
High cost films (including newsreels after multiplying by 2½)	877 436
	1 011 228
Films under 3000 ft (after multiplying by 2½)	137 261
	1 148 489
Levy collections paid to agency by HM Customs and Excise to 29 May 1979 including an estimate of collections approximately covering entertainments for the four weeks ended 26 May 1979	£633 000

The seventh interim allocation for the twenty-second year will be at the rate of 38 per cent.

Cinema admissions and takings in March

During March, counted as a five week period, the weekly average of admissions to cinemas in Great Britain was 2.20 million and the weekly average of gross box office takings was £2.35 million. The comparable figures for March 1978 were 2.72 and £2.40 million.

Table 5 **Overseas transactions of the BBC and IBA programme contractors [3]: analysis by area**

£ million

	1977						1978					
	Total	EEC	Other western Europe	North America	Other developed countries [5]	Rest of the world [5]	Total	EEC	Other western Europe	North America	Other developed countries [5]	Rest of the world [5]
Receipts [1]	35.7	5.2	2.2	20.0	5.6	2.7	38.0	6.3	2.6	17.3	6.7	5.1
Expenditure [4]	16.9	4.8	1.2	9.2	0.5	1.2	24.1	4.5	1.9	13.5	1.0	3.2

[1] [3] [4] [5] See tables 1 and 2.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 29 June 1979.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Moonraker	BR/E 40095C/30/6/84	126	26 June	United Artists Corporation Ltd	Eon Productions Ltd, London, and Les Productions Artistes Associes, Paris
Rock Faces	BR/E 40101/30/6/84	15	29 June	Twentieth Century-Fox Film Co Ltd	Longshot Film Productions Ltd
The Love Tapes	BR/E 40102/30/6/84	23	29 June	Twentieth Century-Fox Film Co Ltd	New Decade Films Ltd
FOREIGN					
Confessions Of The Sex Slaves	F 40096	77	27 June	Tigon Film Distributors Ltd	Avis Filmverleih, Berlin
Eagle's Wing	F 40097	104	27 June	Rank Film Distributors Ltd	Eagles Wing Productions (UK) Ltd, London
Nocturna	F 40098	83	28 June	Miracle International Films Ltd	Compass International Pictures, California
Daughter Of Emanuelle	F 40099	90	28 June	Jay Jay Film Distributors Ltd	A Films Du Berri, Paris, and Titanus Films, Brussels
Mondo Erotico	F 40100	70	28 June	Jay Jay Film Distributors Ltd	Minerva Trading (HK) Ltd, Rome

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Index to statistics published regularly in 'Trade and Industry'

(a) annually (m) monthly (q) quarterly Weekly statistics are not included

Aerospace cost indices (m) page 39
Air transport trade by air (a) 25 Aug 78
Balance of payments current account (m) 29 June 79
summary (q) 30 Mar 79
overseas royalties 12 Aug 77
trends in invisibles 6 Apr 79
see also Overseas trade of the UK
Business names and limited partnerships (a) 23 Mar 79
Capital expenditure manufacturing, distributive and service industries (q) page 40
provisional (q) 1 Jun 79
by regions 18 Feb 77
leasing, hiring and renting out (a) 29 Sep 78
see also Investment
Catering trades turnover (q) 25 May 79
Check trading (a) 18 May 79
Chemicals industry activity (q) 27 Apr 79
Companies acquisitions and mergers (q) 11 May 79
analysis of accounts (q) 7 Jul 78
insolvencies (q) 4 May 79
liquidity (q) 8 June 79
new registrations: Gt. Britain (m) 2 Mar 79
N. Ireland (m) 1 Jun 79
rate of return on capital (a) 22 Sep 78
structure of company financing (a) 16 Feb 79
Construction industry housing report (m) 16 Mar 79
orders (m) 30 Mar 79
output and employment (q) 23 Mar 79
private enterprise housebuilding (m) 29 June 79
work overseas (a) 20 Oct 78
Consumers' expenditure (q) 4 May 79
Depositors, protection of, Act (q) 20 Apr 79
Earnings, wage rates (m) 29 June 79
Energy trends 15 June 79
Engineering industries electrical engineering (q) 20 Apr 79
instrument engineering (a) 6 Apr 79
production indices (m) 29 June 79
sales and orders (m) 22 June 79
Film industry British Film Fund Agency returns (m) page 53
British Film Fund distributions 29 June 79
cinema admissions and takings (m) page 53
annual inquiry (a) 25 Aug 78
exhibitors' quota returns (a) 4 May 79
overseas payments and earnings (a) page 52
registrations of films (a) 23 Feb 79
Food consumption levels (twice a year) 29 Sep 78
household consumption (q) 23 Mar 79
Footwear industry deliveries and stocks (m) 29 June 79
Foreign trade industrial countries' economic indicators (m) page 33
quarterly analysis (q) 1 Jun 79
see also Overseas trade of the UK
Furniture deliveries and orders (m) 15 June 79
Gross domestic product (q) 29 June 79
Health and safety 11 Aug 78
Hire purchase business (m) page 37
Housing *see* Construction industry
Industrial production index numbers (m) 22 June 79
Scotland (q) 26 Jan 79
Wales (q) 11 May 79
Insurance companies authorisations and revocations (m) 15 June 79
investment (q) 29 June 79
investments and assets (a) 10 Nov 78
Investment book values of overseas direct investment 23 Mar 79
industry's investment intentions (3 times a year) 8 June 79
10-year review (a) 27 Oct 78
investment and earnings overseas (a) 9 June 78
see also Capital expenditure, insurance companies, and pension funds
Land and building sales (a) 11 May 79
Made-up clothing orders and deliveries (m) page 51
Man-made fibres deliveries (q) 2 Mar 79
production (m) 29 June 79
quarterly analysis (q) 2 Mar 79
Machine tools (m) Page 38
Moneylenders Acts (q) 20 Apr 79
Motor industry car and commercial vehicle production (m) 29 June 79
provisional (m) 15 June 79
motor trade turnover (q) 8 June 79
Office development permits (q) 8 June 79
Official reserves (m) page 2
Overseas trade of the UK analysis by end-use 15 June 79
analysis by industry (q) 6 Apr 79
analysis of trends (q) 8 Dec 78
direct exporters and credit terms (a) 21 Jul 78
export prospects (q) 22 June 79
import penetration (q) 29 June 79
invoicing in foreign currencies: exports 8 June 79
imports page 45
performance 1963-1978 (a) 16 Mar 79
see also Balance of payments
Pension funds investment (q) 29 June 79
investments and assets (a) 10 Nov 78
Price Commission index (m–final) 25 May 79
Regional development grants (q) 18 May 79
Research and development expenditure and employment 6 Apr 79
Restrictive trading agreements (q) 13 Apr 79
Retail prices index (m) 22 June 79
Retail trades inquiry for 1977: provisional results 2 Feb 79
sales (m) page 36
provisional (m) 15 June 79
stocks (m) 15 June 79
Royalties: overseas transactions (a) 8/22 June 79
Securities, particulars of dealers in 8 June 79
Selective financial assistance section 7 (m) 22 June 79
section 7 £10,000 or more (q) 15 June 79
section 8 (q) 16 Mar 79
Shipping nationality of vessels in UK seaborne trade (a) page 46
UK revenue (a) 13 Oct 78
Steel consumption and stocks (q) 20 Apr 79
provisional (q) 18 Aug 78
Stocks manufacturers' and distributors' (q) page 43
provisional (q) 1 Jun 79
manufacturers' (m) 8 June 79
retail (m) 15 June79
Television overseas payments and earnings (a) page 52
Textiles activity in the industry (q) page 49
carpet sales (m) 22 June 79
cotton industry production (m) 29 June 79
hosiery production (m) 29 June 79
wholesale houses' sales and stocks (m) 29 June 79
wool output (m) 29 June 79
exports (q) 2 Mar 79
Tourism foreign arrivals (m) 16 Feb 79
overseas travel and tourism (a) 6 Apr 79
overseas travel and tourism (q) 6 Apr 79
Unemployment (m) page 42
Unit trusts, particulars of dealers in 18 May 79
Wholesale prices average prices of selected commodities (a) 27 Apr 79
index numbers (m) 22 June 79
initial summary (m) 15 June 79

Organisational information

Commercial representation guide 18 May 79
CRE contact points 25 May 79
Departmental publications (m) 11 May 79
ECGD lines of credit 30 Mar 79
ECGD local offices 6 Apr 79
EEC guide parts 1, 2 and 3 1 Dec, 24 Nov & 8 Dec 78
European public holiday guide (a) 8 Dec 78
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503	513	523	533	543	553	563	573	583	593	603	613	623	633	643	653	663	673	683	693
504	514	524	534	544	554	564	574	584	594	604	614	624	634	644	654	664	674	684	694
505	515	525	535	545	555	565	575	585	595	605	615	625	635	645	655	665	675	685	695
506	516	526	536	546	556	566	576	586	596	606	616	626	636	646	656	666	676	686	696
507	517	527	537	547	557	567	577	587	597	607	617	627	637	647	657	667	777	687	697
508	518	528	538	548	558	568	578	588	598	608	618	628	638	648	658	668	678	688	698
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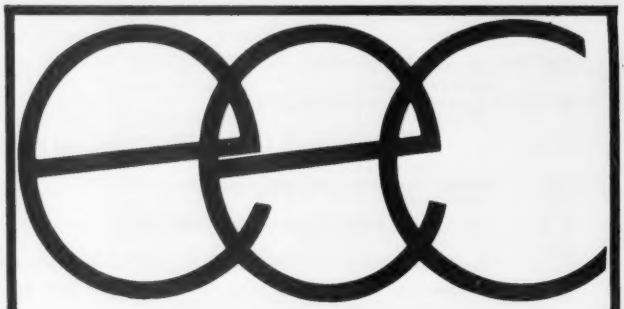

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